

FULLBAY®

2022-2023

STATE OF HEAVY-DUTY REPAIR

IN ASSOCIATION WITH:



MOTOR

2023




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INTRODUCTION & METHODOLOGY

Welcome to the 2023 edition of the *State of Heavy-Duty Repair*—the definitive report on the commercial repair industry—brought to you by Fullbay, TMC, and MOTOR.

REPORT LEGEND:

The following icons indicate whether the information is based on survey responses or real-world shop data.

 SURVEY DATA

 SHOP DATA

This report contains insights, trends, and benchmarks related to the maintenance and management of heavy-duty equipment—including Class 6-8 vehicles, agricultural machinery, emergency vehicles, construction equipment, heavy machinery, commercial fleets, and more.

We obtained the data used in this report through quantitative and qualitative methods. We surveyed more than 1,600 individuals from the commercial freight, logistics, and repair industries; we also sampled more than 500 shops from across North America, Australia, and New Zealand for real-world shop data.

The sampled data is anonymized with the exception of segmenting based on role, geography, and industry. All real-world data was gathered from businesses powered by Fullbay for at least 12 continuous months; survey respondents were a combination of both customers and non-customers of Fullbay.

The goal of this report is to be transparent and unbiased while providing helpful guidance. As you read, you'll see additional information on how data was collected and the methodology for analysis. While we believe this is one of the most comprehensive sets of data ever gathered for the industry—and thus can provide useful insights and benchmarks—there are additional factors to consider when comparing at an individual level. As such, the information in this report should not be considered to be legal, tax, accounting, consulting, or any other professional advice. In all cases, you should consult with professional advisors familiar with your particular factual situation for advice concerning specific matters before making any decisions.

In addition, we've made sure to notate which data points are driven from real-world data and which are based on survey responses. While we did our best to ensure any misleading data was removed from the analysis, you might find some insights based on those surveyed to vary more than you'd expect.

Thank you to the following industry experts who provided their analysis and opinions on the results:

PATRICK MCKITTRICK | CHIEF EXECUTIVE OFFICER, Fullbay

JACOB FINDLAY | CO-FOUNDER & EXECUTIVE CHAIRMAN, Fullbay

CHRIS O'BRIEN | CHIEF OPERATING OFFICER, Fullbay

ROBERT BRASWELL | EXECUTIVE DIRECTOR, TMC

JACK POSTER | VMRS SERVICES MANAGER, TMC

PAUL MOSZAK | VICE PRESIDENT & HEAVY-DUTY EVANGELIST, MOTOR

DON DOTY | VICE PRESIDENT OF THE SERVICE PROVIDER NETWORK, FleetNet America®, Inc.

STACY CONNER | PRESIDENT, Equipment Experts, Inc.

JIMMY WALL | GENERAL MANAGER, Donahue Truck Centers

GLEN GRADER | OWNER/PRESIDENT, Integrity Fleet Services, Inc.

JAY GONINEN | CO-FOUNDER & PRESIDENT, WrenchWay

PETER COOPER | DIRECTOR OF OPERATIONS, Absolute Repair LLC

IRVIN BOWMAN | PRESIDENT, Wayne Truck and Trailer Ltd.

JAMIE IRVINE | HOST & CONSULTANT, The Heavy-Duty Parts Report

LUKE TODD | PRESIDENT, The Service Company

BRIAN VANCAMP | ANALYST, MacKay & Company

AARON PICOZZI | PRESIDENT, American Diesel Training Centers

DALE BOWMAN | OWNER, AM PM Diesel Services

NICK ADAMS | MANAGING DIRECTOR, Dieselmatic Digital Inc.

TROY WILLICH | CEO AND CO-FOUNDER, TDI Fleet Services

BILL BLACK | OWNER, National Fleet Management, Inc.



A MESSAGE FROM TMC.

For decades, the American Trucking Associations' Technology & Maintenance Council (TMC) has provided members with best practices that address the critical technology and maintenance issues impacting truck fleets.

Today, it has the largest, most diverse group of maintenance and equipment experts available in the country to help you answer whatever technical challenges your company might face. As a TMC member, that experience and expertise is at your fingertips. Get reliable answers to the challenges you face every day in this industry!



BECOME A MEMBER OF TMC/ATA

Take your shop to the next level and save \$50 on membership when using promo code **TMCFULLBAY23**

fullbay.com/tmcmembership

tmc.trucking.org

(703) 838-1763

tmc@trucking.org



TMC recommended practices can help solve many problems facing shops today. Whether it be for technicians or shop managers, the RP's are loaded with solutions to common challenges.



ROBERT BRASWELL

EXECUTIVE DIRECTOR,
TMC

**Recommended Practices are specifications, the adoption of which is voluntary, which are used to assist in the purchase, design, maintenance, and performance of equipment. There are two categories: maintenance and engineering. To access the entire collection, go to fullbay.com/tmcrps*



A MESSAGE FROM MOTOR.

MOTOR Information Systems is one of the world's premier suppliers of light-, medium-, and heavy-duty automotive data, covering Class 1 through Class 8 vehicles. Though our products and services have continued evolving to meet our customers' needs, our mission to help businesses run more efficiently and profitably remains our driving force.

MOTOR is the leading provider of parts, service, and labor data—including maintenance, repair, and estimated labor times—for fleets, service and repair providers, technology providers, parts suppliers, and other growing sectors in the

automotive industry. No other database compares to MOTOR's vast collection of comprehensive, reliable, all-makes data, which includes hundreds of millions of records for parts, labor, and service.

Whether you need a white-label solution, data licensing, professional services utilizing our database for specific needs, or detailed data for building an e-commerce platform, MOTOR has the automotive data you need.

Learn more at fullbay.com/motor!

MOTOR



RESPONDER DEMOGRAPHICS.

We'll get started by learning about the people who responded to the State of Heavy-Duty Repair survey. What does the commercial repair industry look like as of 2023?

WE ASKED ABOUT TOPICS LIKE:

- ➔ Employee ages
- ➔ Gender breakdowns
- ➔ Years in the industry



It's great to see that 41% of employees were in that 25-34 range...but [only] 5% were 24 years old or younger. I do believe that is reflective of our industry as a whole. Our problems are going to start becoming significantly worse if we don't start getting more involved with people at a younger age. This should be a wake-up call for all of us to work with high schools and tech schools to support them as much as we can.

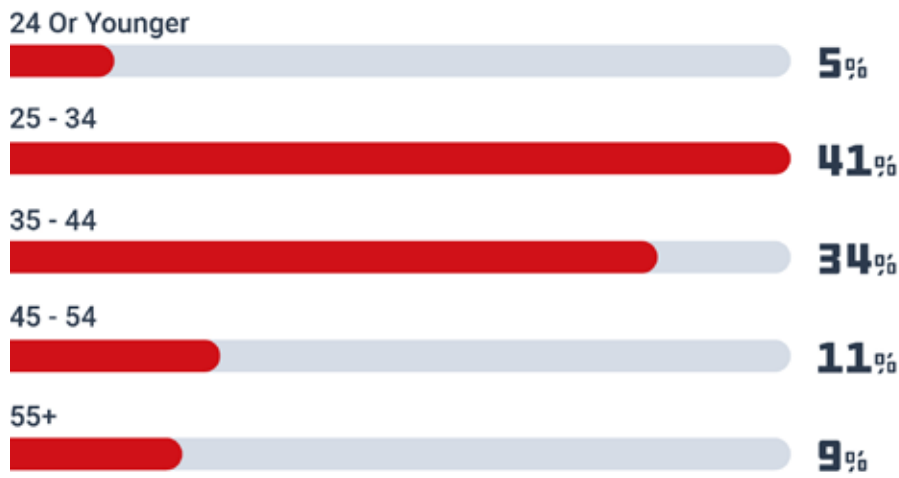


JAY GONINEN

FOUNDER & PRESIDENT
WrenchWay

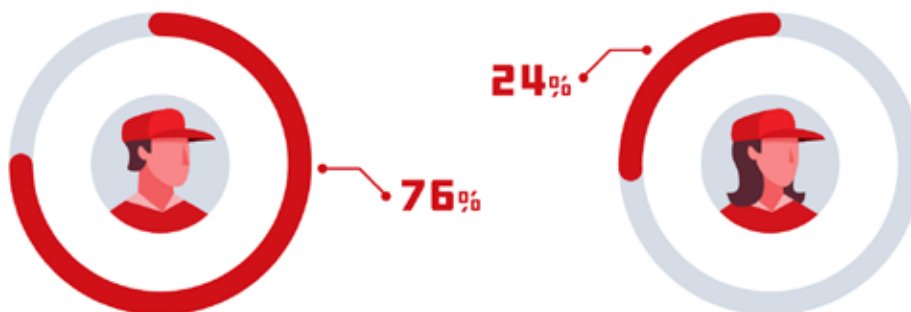
AGE RANGE OF SHOP EMPLOYEES

We've talked a lot about the difficulty shops have in hiring younger techs, and this is reflected in our respondents—only 5% were 24 years old or younger. In contrast, the old guard is hanging in there: Nine percent of our respondents were 55 and up.



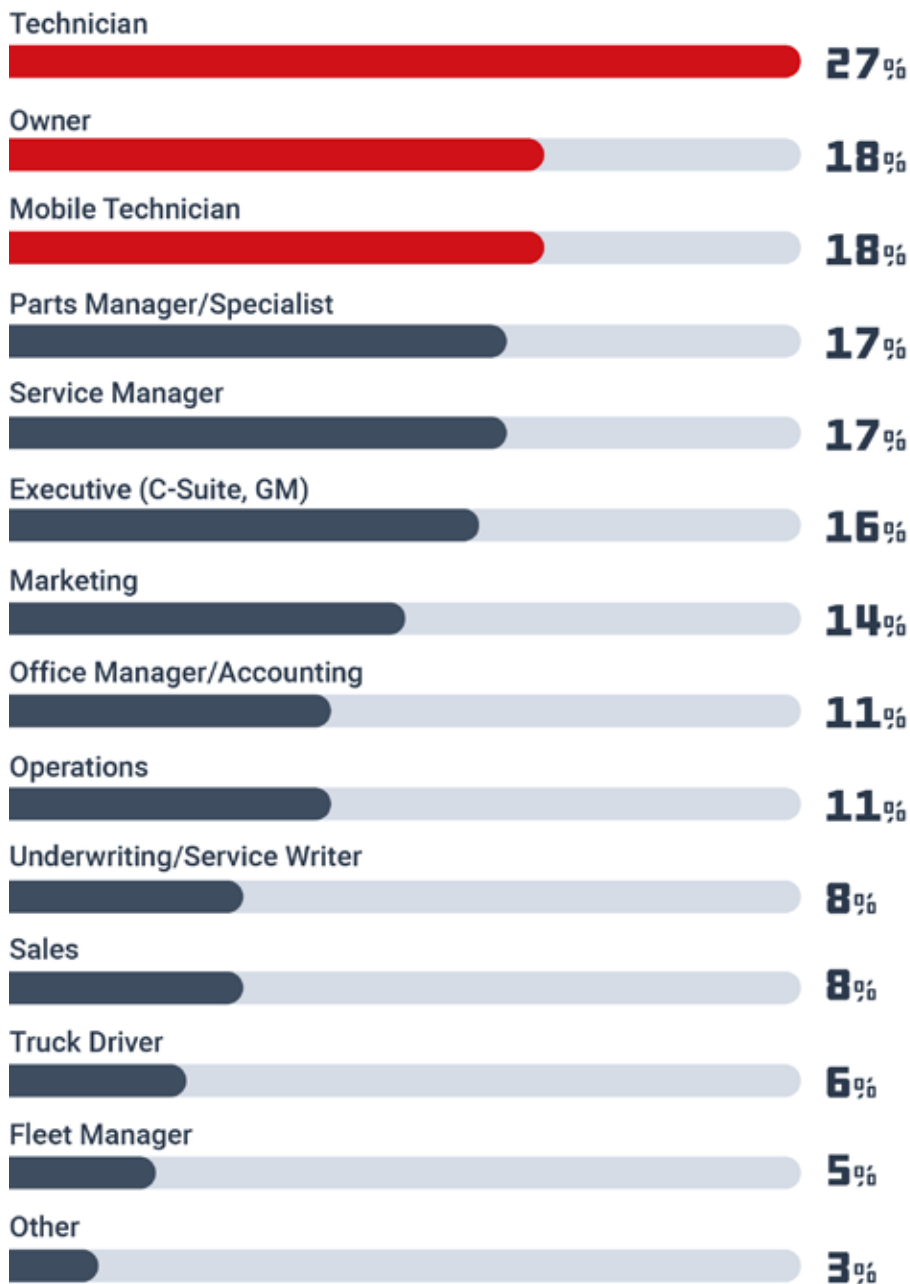
GENDER BREAKDOWN

While diesel repair is still a male-dominated industry, women are definitely catching up—they made up nearly a quarter of our respondents!



WHO DOES WHAT IN THE SHOP?

This question asked respondents to select all roles that applied to them. Most of our respondents (27%) said they were technicians; 18% indicated they were owners, and a further 18% were mobile technicians. Parts managers and service managers made up 17% of our respondents, respectively.



*Responders selected all that applied

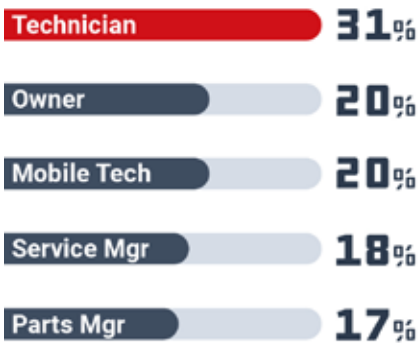
☑️ HOW ARE ROLES DISTRIBUTED?

About 20% of the women who responded were in or handled marketing for a shop. A further 18% were in office manager/accounting roles. Just 14% of women reported working as technicians. Keep in mind this doesn't mean 14% of all technicians are women, but rather 14% of the women we surveyed identified as techs.

The men largely identified themselves as technicians (31%), owners (20%), and mobile techs (20%).



TOP 5 ROLES OF MALE RESPONDERS



TOP 5 ROLES OF FEMALE RESPONDERS



**Responders selected all that applied*

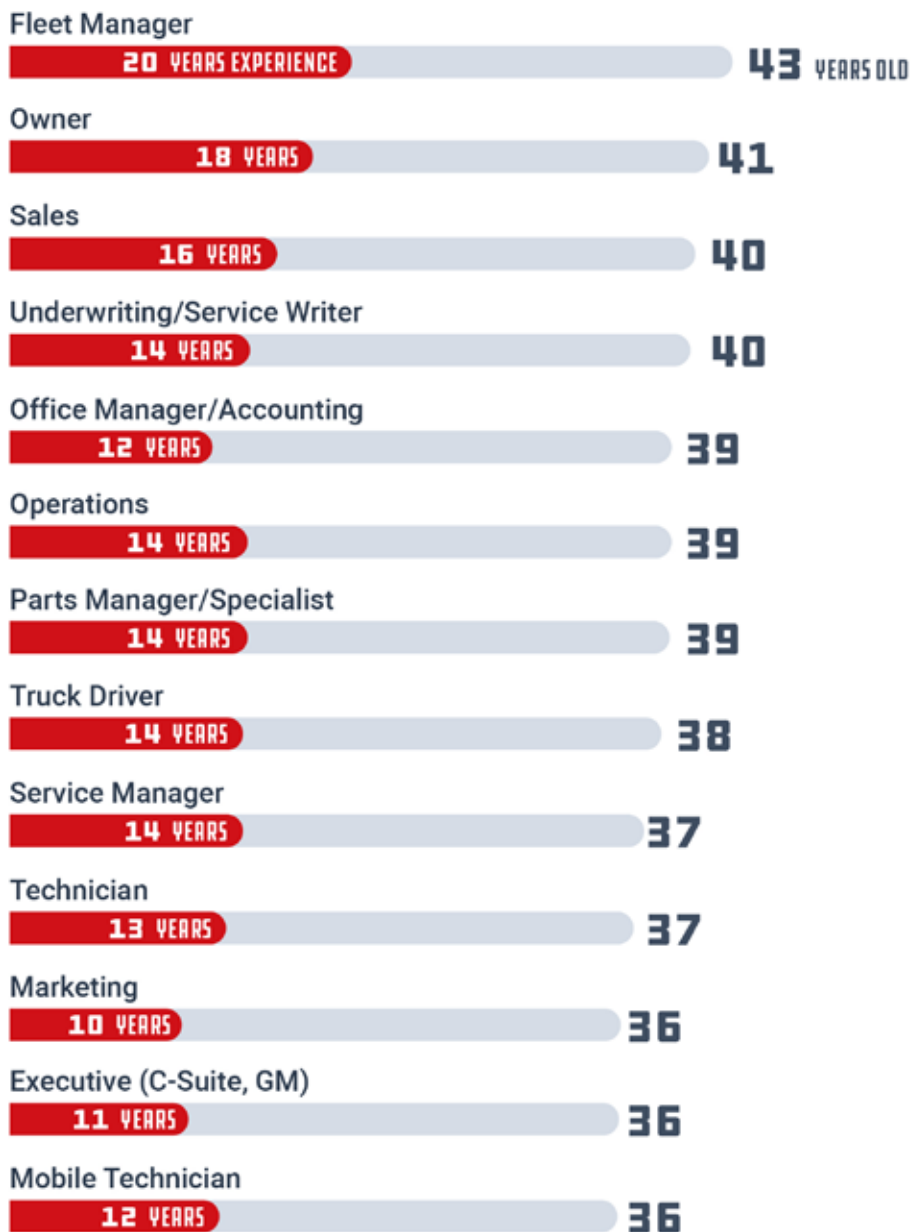
☑️ CHECK ALL THAT APPLY

You're no doubt aware that people working in repair shops often wear more than one hat. Sometimes they wear a *lot* of hats. But to make things 100% clear, many of these questions allowed respondents to "Check all that apply"—that is, an owner could also be a technician, parts manager, office manager, and coffee runner.

08 11 ROLE BREAKDOWN BY YEARS OF EXPERIENCE AND AGE

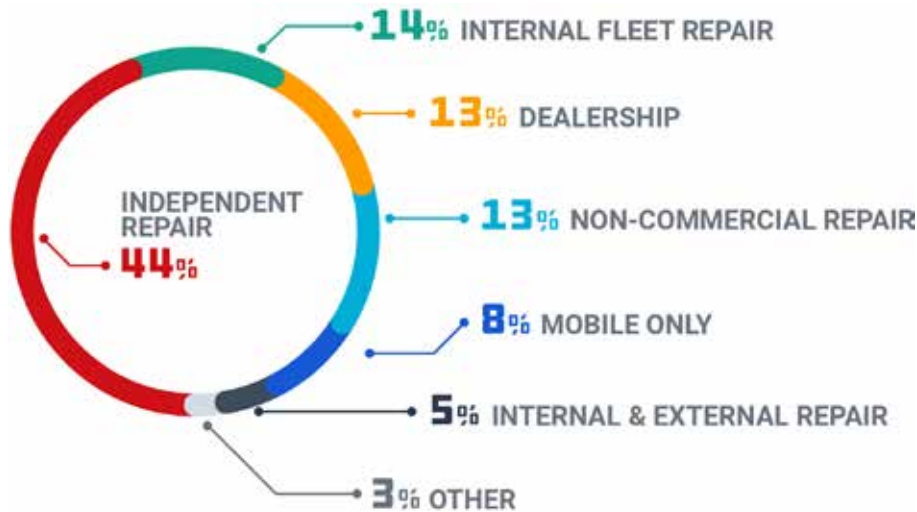
How long does it take to make your way from tech to owner? It depends on your path. Fleet managers tended to have the most years of experience (20 years) to correspond with their average age (43 years); owners came in second with 18 years of experience to an average age of 41 years of age.

The youngsters, meanwhile, are represented by mobile techs, marketers, and executives, all of whom average 36 years of age.



WHAT KIND OF BUSINESS DO YOU RUN?

Not quite half (44%) of the shops we talked to classed themselves as independent repair shops. Thirteen percent of our respondents were from dealerships, and 14% represented internal fleet repair.



HOW MANY YEARS HAVE YOU BEEN IN BUSINESS?

We're always excited to see new shops emerging, and about 16% of our respondents have been around for two years or less. Older shops—those in business for 30+ years—were in the minority, comprising just 10% of responses.

Interestingly, 22% of the newest shops were located in the Northeast, while the oldest shops are in the Midwest!



Considering 42% of the shops surveyed have been in business for five years or fewer, there exists a huge opportunity to bring new life and approaches to heavy-duty repair.



AARON PICOZZI
PRESIDENT
American Diesel Training Centers



SHOP DEMOGRAPHICS.



What is life like in a commercial repair shop? In this section, we're diving into shop lifespan, financials, number of employees, and more.

YOU'LL LEARN ABOUT:

- ➔ Years in business
- ➔ Labor rates by region
- ➔ Technicians employed

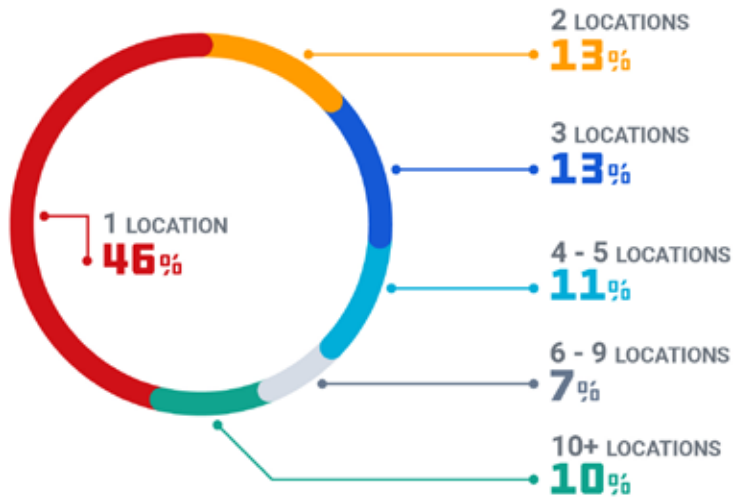
There are a lot of great things for a young shop to learn from shops that have been around for a while. My feeling is that newer shops would be best served to find a business coach to help them make their shops profitable. In today's world, your shop needs to be as profitable as possible so you can offer competitive wages, provide the right facilities, and invest in tools to keep up with changing technologies.



JAY GONINEN
FOUNDER & PRESIDENT
WrenchWay

NUMBER OF LOCATIONS

Most independent repair shops are small businesses—46% of our respondents reported only one location—for our purposes, a full brick-and-mortar shop with repair bays. From there, we saw a sharp drop to 13% of shops operating in two locations and 13% in three locations.



Additional data from the survey tells us the following:

- ➔ Most single-location shops employ 3 to 4 techs
- ➔ Those in two locations usually have between 5 and 7 techs
- ➔ Those with three locations may have 13 to 20 techs
- ➔ Those with four locations or more may have as many as 41+ techs

RP 510A



ESTIMATING NUMBER OF SERVICE BAYS

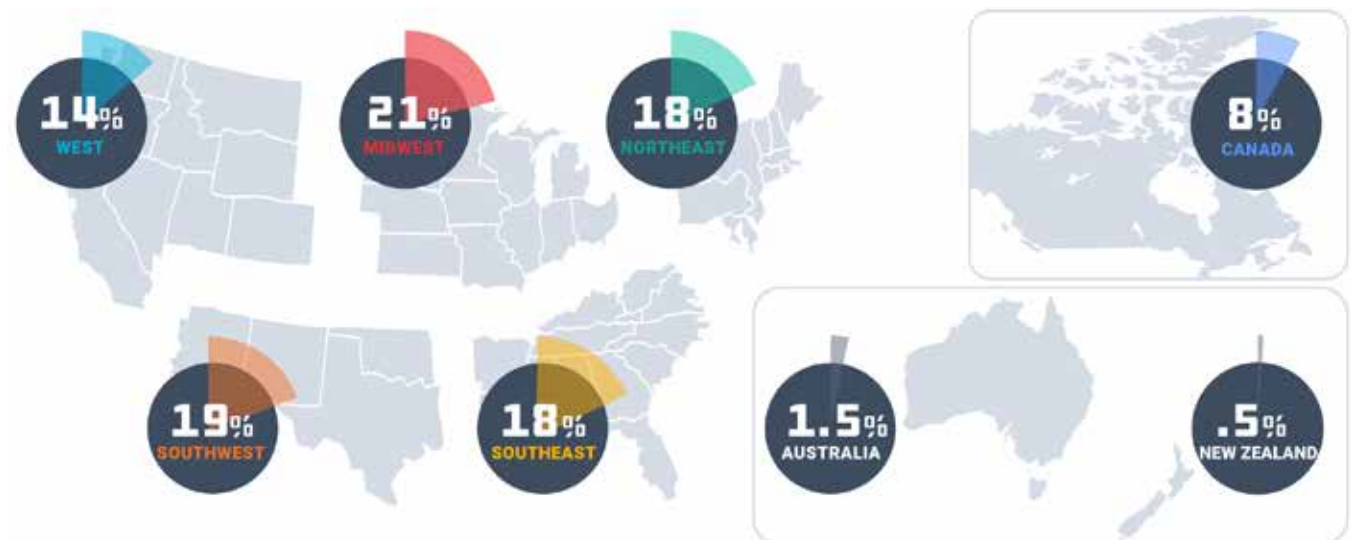
Estimate how many service bays you'll need! Our friends at TMC/ATA have a methodology that will help you.

fullbay.com/RP510A

SHOP LOCATIONS BY REGION IN 2022

The Midwest contained the most shops—21% in total. The Southeast and Southwest regions were close behind, being home to 18% and 19% of the total number of shops, respectively.

While Canada, New Zealand, and Australia represented small percentages of our survey respondents, it's important to note that they may not be fully representative of all shops in those countries.

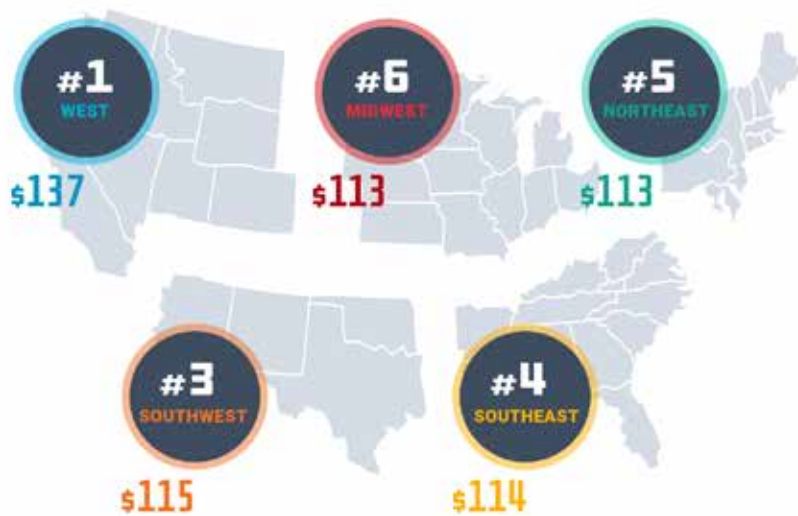


SHOP LABOR RATE BY REGION IN 2022

The West has the highest average labor rate, at \$137/hour, while the Midwest and Northeast each have the lowest, charging an average of \$113 per hour.

Our data indicates that labor rate increases by number of techs, as shops that employ 13 to 20 technicians charge the highest labor rates.

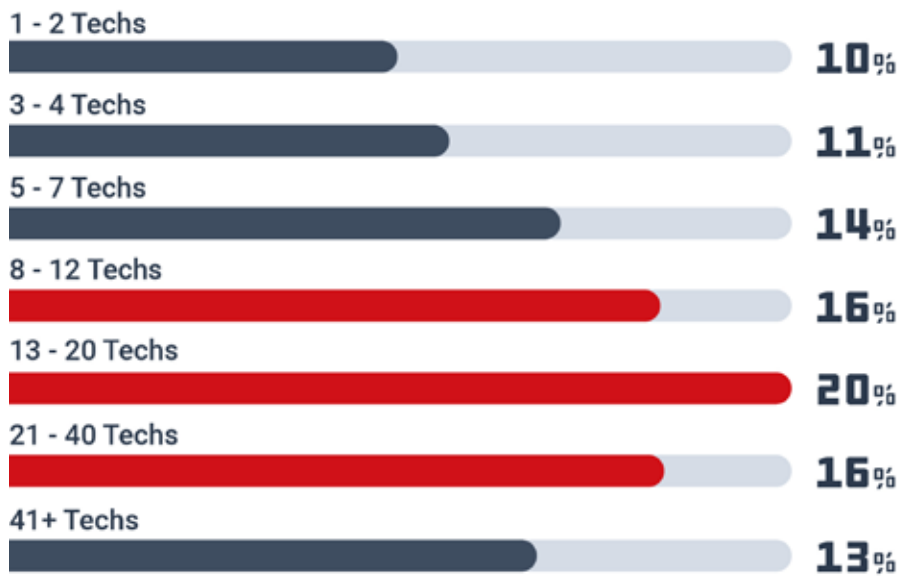
**All dollar amounts in USD. Please note region numbers are averages, and different states and cities inside the region may have higher or lower labor rates.*



OVERALL AVERAGE LABOR RATE: \$118

08 || HOW MANY TECHNICIANS DO YOU EMPLOY?

About 20% of our responding shops had between 13 to 20 technicians working for them. On the low end of the scale, 10% of shops had 1 to 2 techs employed; on the high end, 13% of shops had 41+ techs on the payroll.



FULLBAY

BEST PRACTICES

Recruiting and retaining technicians is one of the keys to a successful and long-running operation. Learn how to hire smartly and build a winning team in this webinar:

fullbay.com/recruitandretain

RP 512B



TECHNICIAN STAFFING DETERMINATION

Proper staff-to-bay ratio is crucial to a successful shop. Our partners at TMC/ATA have worksheets to help you determine your staffing levels.

fullbay.com/RP512B

SCHEDULED WORK

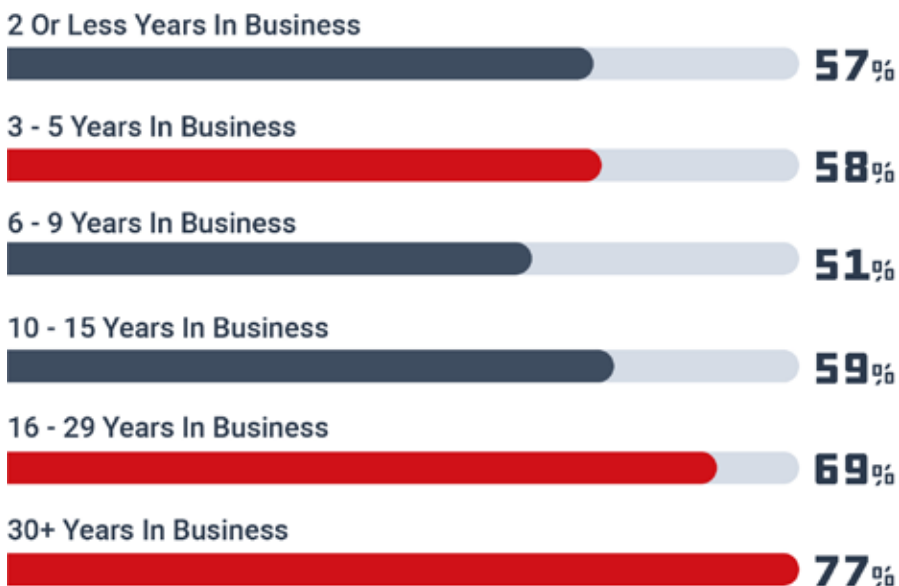
We found that 49% of shop work is scheduled ahead of time, while 51% of work is as requested or emergency.



REPEAT BUSINESS

Shops report that over half the work they do—59%, to be exact—is repeat business. That is, happy customers returning again and again. Shops over 30 years old and shops with 4 or less techs seem to attract the most repeat business.

The older shops, in particular, command high loyalty from their customers: 77% had been in before! It's nice to see, but also not surprising—these shops have decades of excellent work behind them.



RP 1613



SHOP WORKLOAD AND PRIORITIZATION

Technician availability and skill all factor into how you schedule your shop's workload—along with the urgency your customers present. TMC has developed guidelines to help you build a smooth and streamlined process.

fullbay.com/RP1613



Seeing high rates of repeat business is encouraging, but shops should never feel like they have enough or too much work—if you're not growing, you're dying.



PATRICK MCKITTRICK
CHIEF EXECUTIVE OFFICER
Fullbay



SHOP REVENUE.

The diesel repair industry can be lucrative—but how much a shop earns will depend on what services it offers, number of techs on staff, and even where it's located.

YOU'LL LEARN ABOUT:

- ➔ What variables impact earning ability
- ➔ Average ticket revenue
- ➔ Revenue per tech



There is room for improvement for many shops. Adding technicians may lead to revenue increases, especially if they are trained using software, data, and tools to increase job proficiency.



PAUL MOSZAK

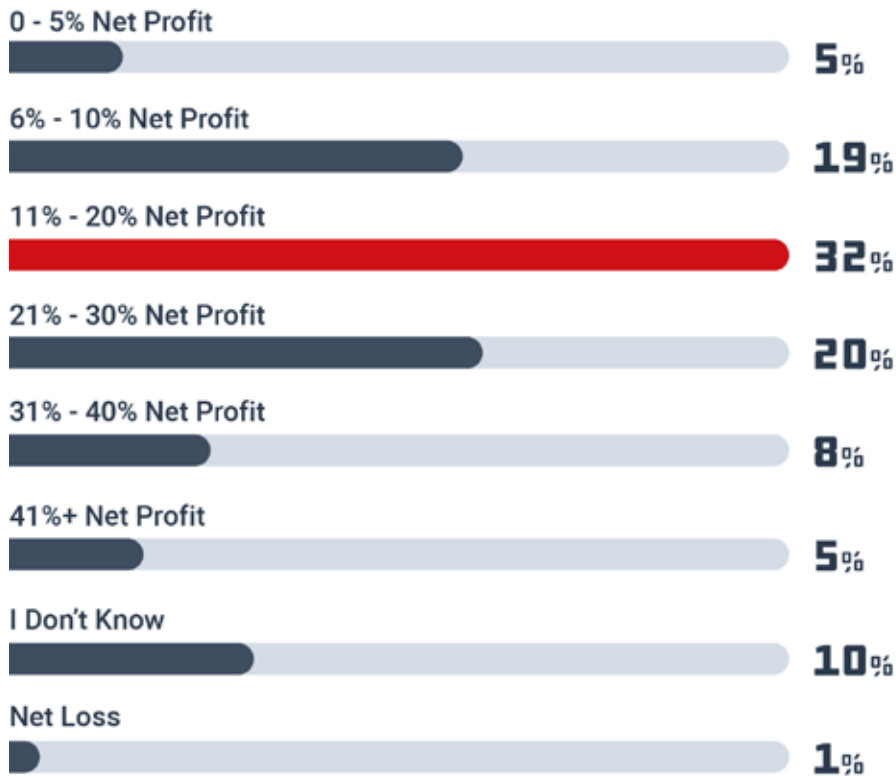
VICE PRESIDENT
& HEAVY-DUTY EVANGELIST
MOTOR Information Systems

SHOP NET PROFIT IN 2022

We have good news on this end: More shops are paying attention to their net profits and losses than in recent years. In 2020, 20% of shops didn't really know how they were doing; by 2022, that percentage dropped to 10%.

Here's a tip: The more small businesses are aware of their profits or losses, the better they're going to do.

In further 2022 reporting, 32% of respondents indicated an 11 to 20% profit, while 5% saw 41% or greater profit. Fortunately, only a little over 1% reported a loss.



BEST PRACTICES

Understanding what your profit is—and what it isn't—will help you better understand your shop's financial situation. Profit is what's left after you cover labor, parts, and overhead costs, but there's more to it than that. Learn more here:

fullbay.com/shopprofit

ANNUAL REVENUE RANGES FOR REPAIR SHOPS

We saw a lot of variance in repair shop revenue. A full 25% of shops surveyed were pulling in between \$1 to \$2 million each year, while 17% reported revenue between \$250,001 and \$500,000.

According to our data, most shops that crossed the \$2 million mark were at least 16 years old. Shops also generally saw revenue increase as they added technicians.



BUILD A REVENUE FUNNEL

Keep work—and revenue—flowing into your shop by building a revenue funnel:

1. Make sure you're **MARKETING** your shop—how's your digital footprint?
2. **CREATE STRONG RELATIONSHIPS** with your customers and community.
3. Keep **BUCKETS OF PROSPECTIVE WORK** like preventive maintenance, intake inspections, pending repairs, and more—you can contact these customers as necessary.
4. **TAKE PRIDE IN YOUR WORK** and making the roads safer for everyone. High-quality work means satisfied customers—and satisfied customers come back.

Learn more about revenue funnels at:

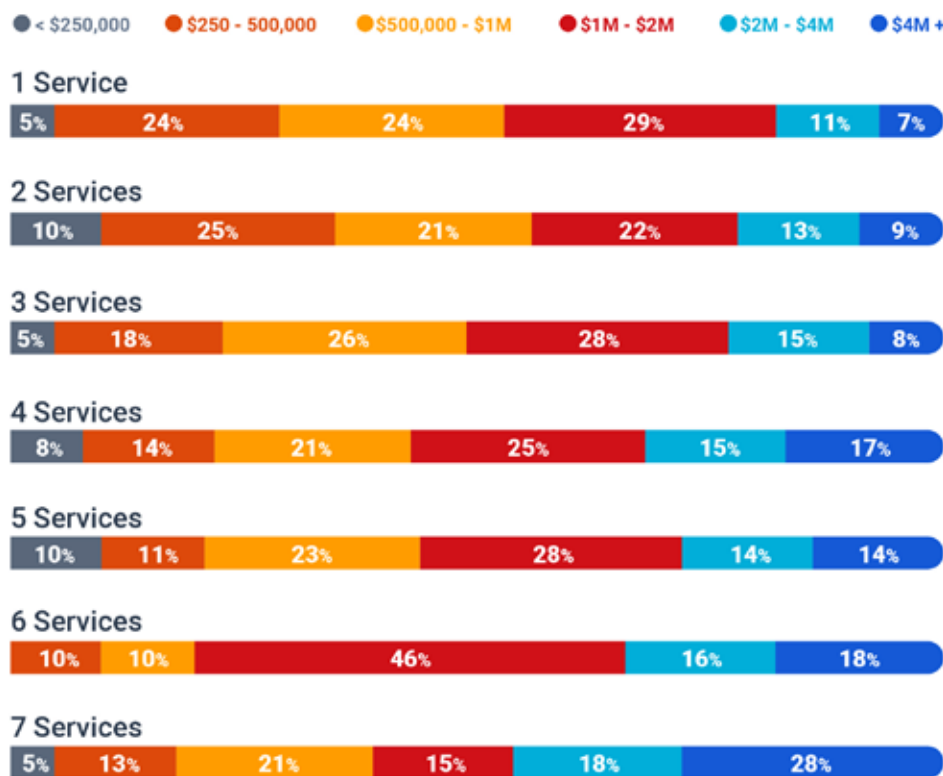
fullbay.com/revfunnel

ANNUAL GROSS REVENUE BY SERVICES

Our data suggests that, generally speaking, more services—encompassing any repair or maintenance service like mobile repair, tire repair, and welding/fabrication, among others—offer a route to more revenue.

However, there are two major thresholds to increasing revenue when it comes to services provided. The first is offering more than three services—shops that did this increased their ability to reach \$500,000 in revenue. The second is offering more than seven services, which can help a shop earn more than \$2 million.

**All dollar amounts in USD.*



I strongly encourage shops to evaluate the performance of their revenue in their company. As it relates to techs, the bottom line is tech efficiency and utilization. Leverage the ROI calculator—it's free, so use it! It will help you make good decisions for your business.



CHRIS O'BRIEN
CHIEF OPERATING OFFICER
Fullbay

DID YOU KNOW?

You should always have a good idea of where your money is going before you make an investment. Fullbay's free ROI Tool is like a crystal ball for your finances—it won't tell you the future, but it will show your shop's financial future based on the numbers you feed it.

fullbay.com/ROI

ANNUAL GROSS REVENUE BY VEHICLES SERVICED

Limiting your shop to one or two types of vehicles can severely impact your revenue prospects. Shops that can service four to six makes and models seem to be the sweet spot for the highest revenue potential. That said, once shops begin servicing seven types of vehicles or more, their revenue potential drops to the same level as shops servicing three (or fewer) types of vehicles.

● < \$250,000
 ● \$250 - 500,000
 ● \$500,000 - \$1M
 ● \$1M - \$2M
 ● \$2M - \$4M
 ● \$4M +

**All dollar amounts in USD.*

1 Vehicle Type



2 Vehicle Types



3 Vehicle Types



4 Vehicle Types



5 Vehicle Types



6 Vehicle Types



7 Vehicle Types



8 Vehicle Types



9 Vehicle Types

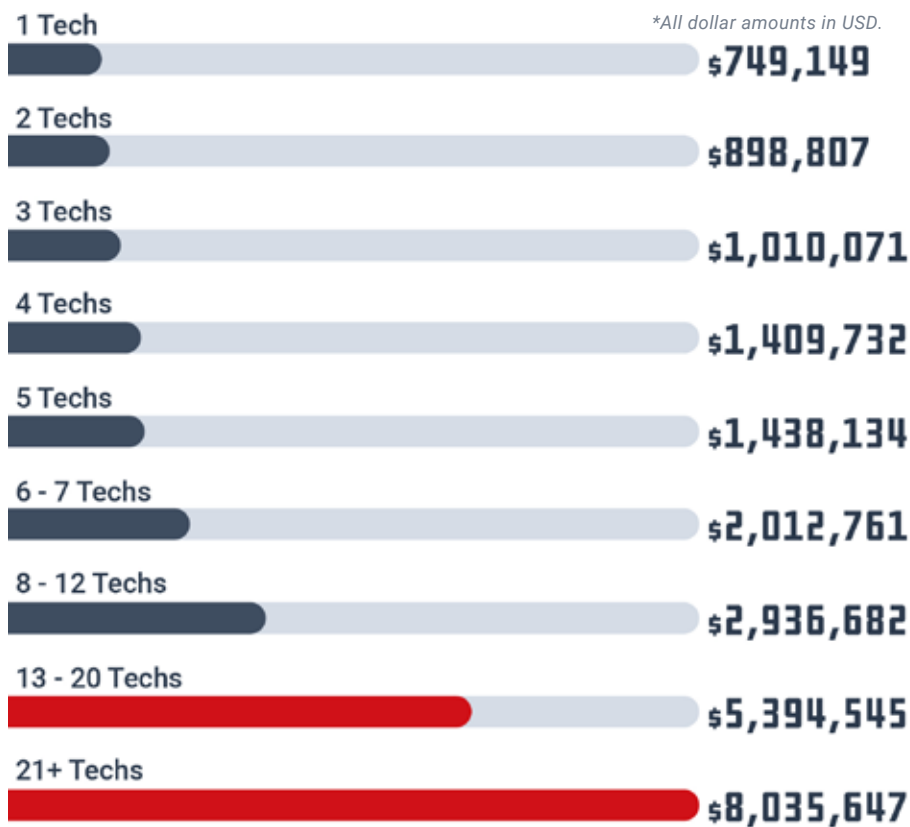


10 Vehicle Types



COMPANY ANNUAL REVENUE

We turned to the Fullbay database to learn more about what kind of revenue shops are bringing in. While the information is completely anonymized, we can see that shops that use Fullbay earn an average of \$1.3 million per year. We also found revenue steadily increases as shops add techs; even going from 3 to 4 techs will yield a 40% increase. Still, the largest jump occurs when shops start hiring 13 or more technicians.



It's interesting to see where we fall in the shop revenue averages with other shops our size. Using the data from the complete report we can correlate the information to develop new strategies to increase revenue and market strength.



TROY WILlich
CEO & CO-FOUNDER
TDI Fleet Services

DID SHOPS RAISE THEIR LABOR RATES IN 2022?

Seventy-six percent of the shops we surveyed told us they raised their labor rates in 2022. The other 24% did not.

What influences a shop's decision to raise labor rates? We noticed that the more techs a shop had, the higher the increase tended to be. Shops with 1 to 2 techs, for example, hiked their rates an average of \$7.10 per hour, while shops with 21 to 40 techs raised their rates an average of \$14.60 per hour.

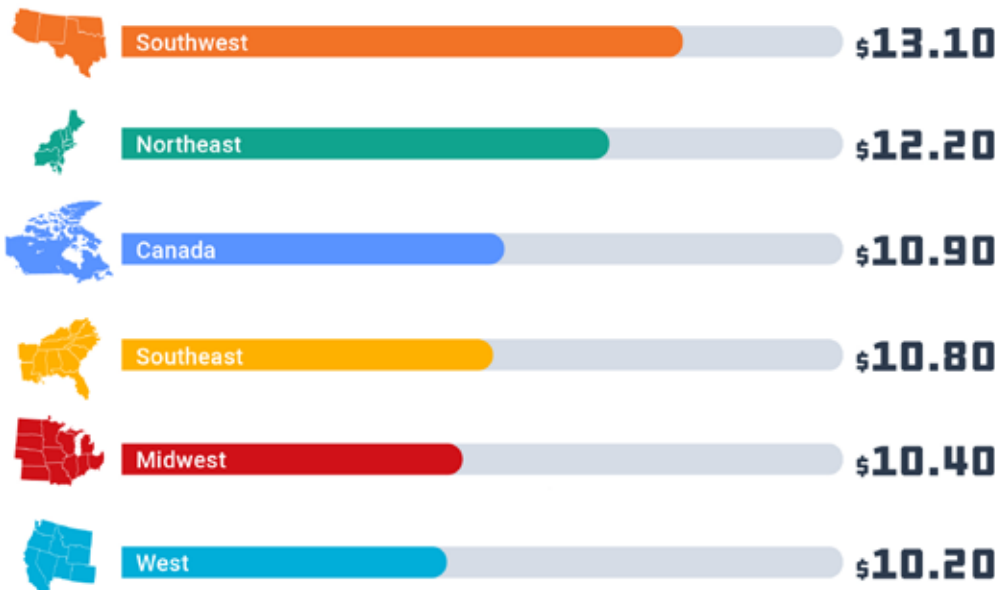


Why wouldn't shops raise labor rates and increase technician pay? In these inflationary times, I wonder how many of these technicians have changed jobs.



PAUL MOSZAK
 VICE PRESIDENT
 & HEAVY-DUTY EVANGELIST
 MOTOR Information Systems

A shop's location may also impact its labor rates. The Southwest had the highest overall increase (\$13.10 average) with the Northeast right behind it (\$12.20 average).



**All dollar amounts in USD.*



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FULLBAY.COM

02 DOES RAISING YOUR LABOR RATE IMPACT TECHNICIAN HOURLY RATES?

To answer this question, we first looked at the shops that did not raise their labor rates. Of them, 58% stated they also did not raise the hourly wages of their technicians. From this, we can extrapolate that 42% of shops that didn't raise their labor rates did give their technicians an hourly bump.

We then moved on to the shops that did raise their labor rates. Eight percent of them reported that they didn't bump the hourly rates of their techs—but 92% did.



BEST PRACTICES

If your market allows it, **RAISE YOUR LABOR RATE AND GIVE YOUR TECHNICIANS RAISES!**

Well-paid techs are often happier techs, and happier techs do much better work.

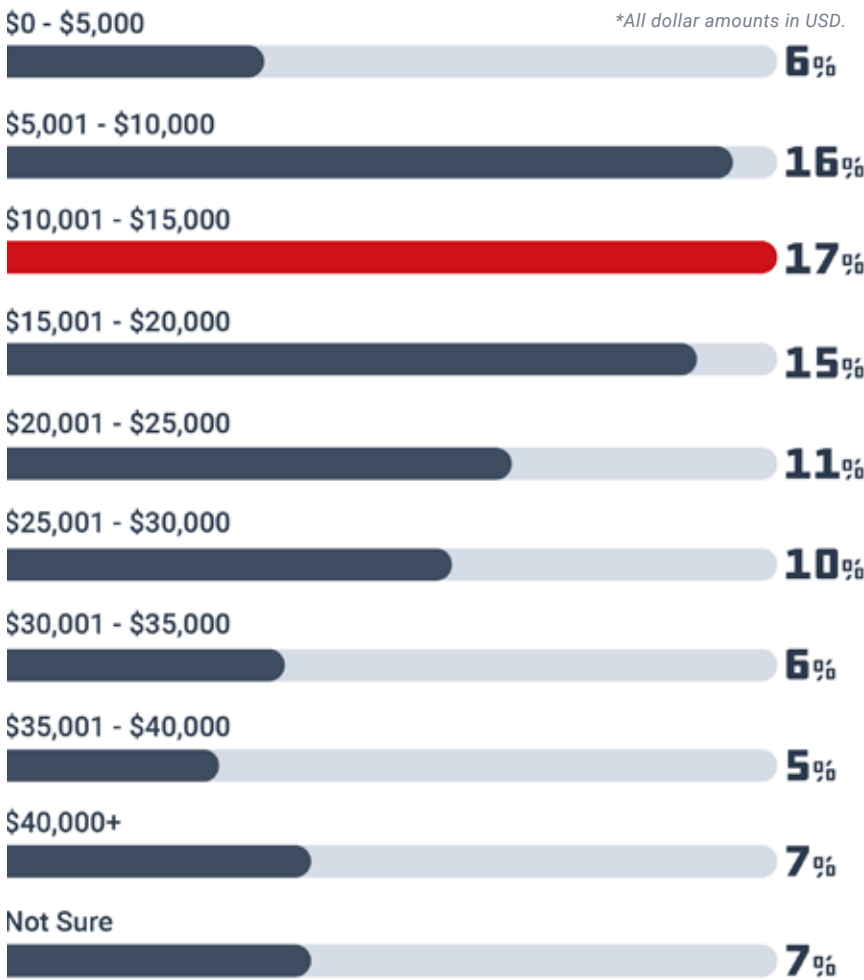
Not sure how to do that?

We've got an ebook all about it:

fullbay.com/laborrates

MONTHLY REVENUE GENERATED PER TECH

How much money each technician generates per month depends on geographical location and overall labor rate—but most are bringing in between \$5,000 and \$20,000. We did find some outliers that generate over \$40,000 per month (7%) and \$5,000 or less (6%). Please note that it’s possible these outliers represent flat rate revenue.



DID YOU KNOW?

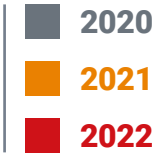


At long last, we took a look at the top monthly revenue ranges per technician from different types of shops and found the following:

- MOBILE-ONLY:**
\$20,001 to \$30,000
- INDEPENDENT REPAIR:**
\$15,001 to \$20,000
- DEALERSHIP:**
\$10,001 to \$20,000
- INTERNAL & EXTERNAL REPAIR:**
\$10,001 to \$15,000
- NON-COMMERCIAL REPAIR:**
\$10,001 to \$15,000
- INTERNAL FLEET REPAIR:**
\$5,001 to \$10,000

YEAR-OVER-YEAR MONTHLY REVENUE GENERATED PER TECH

How much money each technician generates per month depends on geographical location and overall labor rate—but most are bringing in between \$10,000 and \$25,000. We did find some outliers that generate over \$40,000 per month (7%) and \$5,000 or less (6%).

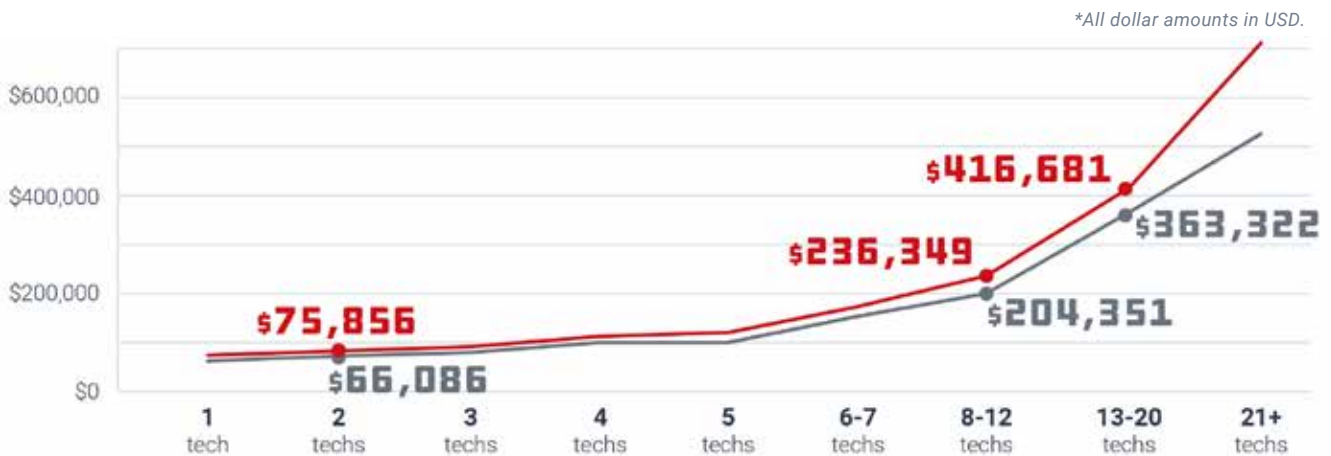
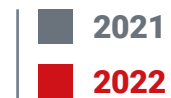


We also compared monthly revenue generated per tech across all three State of Heavy-Duty Repair reports. In 2022, there was a decrease in shops reporting making \$5,000 to \$10,000 when compared to 2020, while there was a definite increase in shops reaching the \$30,000+ range. Now that's some good cheddar!



TECHNICIAN CONTRIBUTION TO ANNUAL REVENUE

As shops add more techs to the payroll, they see a continuous uptick in revenue. One of the biggest monthly revenue jumps we've seen occurs when a shop hires its second full-time technician; we also see dramatic revenue leaps when a shop goes from 8 to 12 techs to 13 to 20 techs.





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INDUSTRY REVENUE TRENDS.

We approached this section with one overarching question: How is the commercial diesel repair industry doing overall? We examined year-over-year data to get the answer.

WE LEARNED:

- ➔ How the United States and Canada performed, revenue-wise
- ➔ Differences in monthly regional revenue



While the year-over-year growth looks to have slowed down, the reality is that 2021's rebound from the pandemic likely inflated those figures. Overall, growth continues to look strong.



JACOB FINDLAY
CO-FOUNDER &
EXECUTIVE CHAIRMAN
Fullbay

AVERAGE COMPANY REVENUE YEAR-OVER-YEAR PERCENTAGE CHANGE

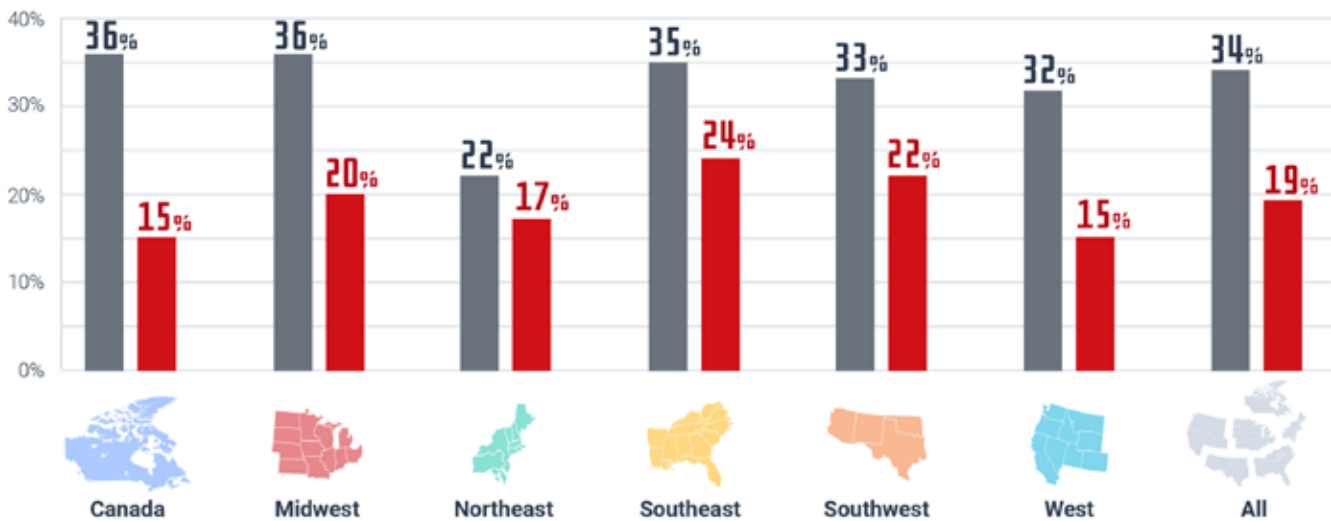
In 2021, shops across continental North America averaged 34% growth over 2020; in 2022, shops grew 19% on top of that 34%.

While these numbers might suggest shops saw less growth in 2022, bear in mind that 2021 was largely a rebound year after the slump of 2020. Once shops had recovered from their pandemic troubles, they did continue to see steady growth.

Our data tells us the Southeast had the greatest year-over-year growth in 2022, with the Southwest and Midwest close behind.

2021 GROWTH
COMPARED TO 2020

2022 GROWTH
COMPARED TO 2021



The regional comparisons are great benchmarks to be used by shops trying to better align themselves with the local and relevant markets.

BRIAN VANCAMP

ANALYST
MacKay & Company



AVERAGE COMPANY REVENUE PER MONTH—YEAR-OVER-YEAR PERCENTAGE CHANGE

There’s no question that 2020 was a difficult year for the industry—year-over-year revenue was down 3% in January of 2021. Fortunately, a reversal was on the way; January of 2022 recorded a 19% increase over the numbers seen in 2021, for a total of 19% growth year-over-year since 2021.



We’ve broken down more specific, region-based data in the graphs on the following pages; the graph below, however, reflects the total for the United States and Canada.

**2021 data is compared to 2020, while 2022 data is compared to 2021*



The last quarter of 2022 saw freight rates fall as fuel prices went up. Lower income and increased cost has caused financial stress for many trucking companies, and 2023 will be a challenging year to navigate as we work with a changing economy. A few of the most important things for a shop to watch out for this year are accounts receivable, labor efficiency, and matching overhead to revenue.



IRVIN BOWMAN
PRESIDENT
Wayne Truck and Trailer Ltd.



CANADA

**2021 data is compared to 2020, while 2022 data is compared to 2021*



SOUTHWEST

**2021 data is compared to 2020, while 2022 data is compared to 2021*





MIDWEST

**2021 data is compared to 2020, while 2022 data is compared to 2021*



WEST

**2021 data is compared to 2020, while 2022 data is compared to 2021*





SOUTHEAST

**2021 data is compared to 2020, while 2022 data is compared to 2021*





NORTHEAST

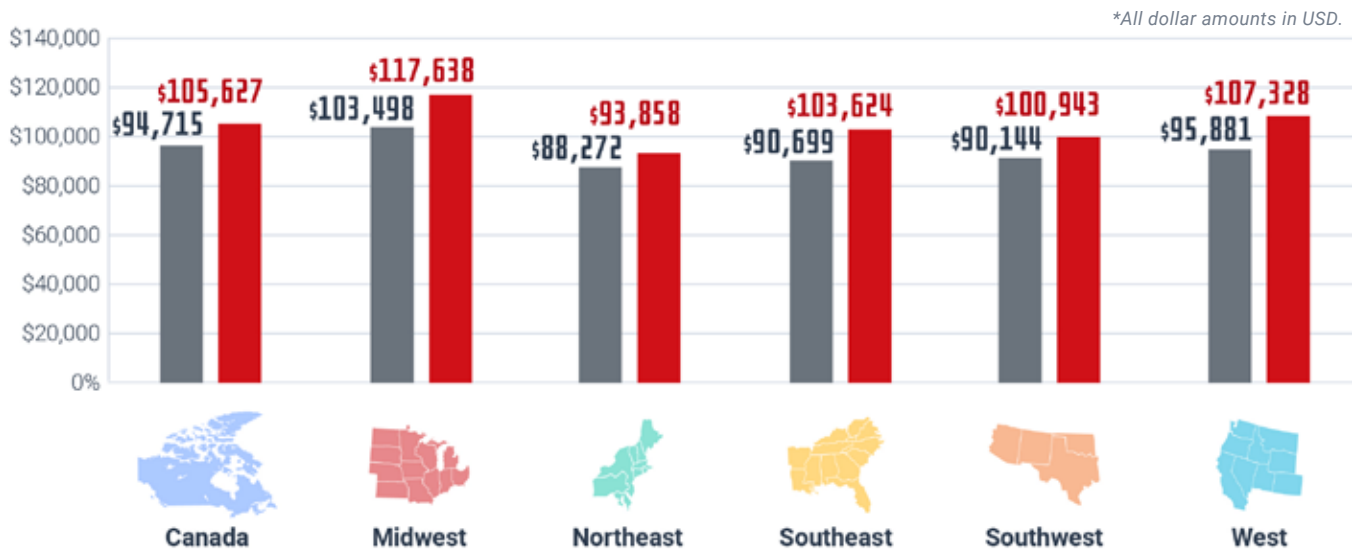
**2021 data is compared to 2020, while 2022 data is compared to 2021*



AVERAGE COMPANY REVENUE PER MONTH (BY REGION)

We returned to the Fullbay database to examine regional differences in monthly revenue. Shops in all regions (including Canada) saw year-over-year growth, but overall, shops using Fullbay made \$12,150 more per month in 2022 than they did in 2021. Not bad, if we do say so ourselves!

 2021 revenue
 2022 revenue



2021 AVERAGE REVENUE PER MONTH: **\$95,267**

2022 AVERAGE REVENUE PER MONTH: **\$107,417**



SHOP SERVICES.

While there are many similarities in how shops across the country operate, everyone has their own “way” of getting things done. Let’s take a look at what services shops offer, what they charge, and more.

READ ON TO LEARN ABOUT:

- ➔ The services repair shops provide
- ➔ What shops charge for diagnostics
- ➔ What vehicles shops are working on



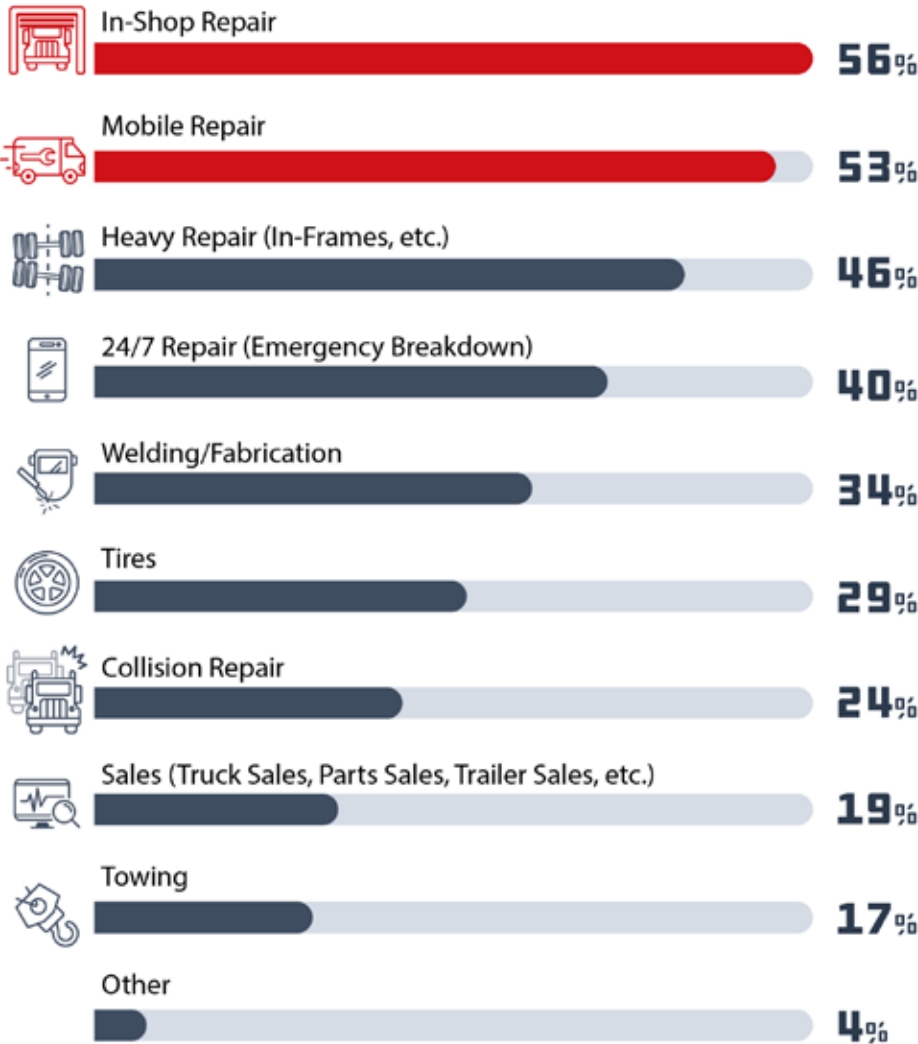
We say this a lot—if you are not in the mobile business, you are more than likely missing out revenue and savings. It is more cost-effective to have a mobile truck than brick-and-mortar shops spread out all over the country.




CHRIS O'BRIEN
CHIEF OPERATING OFFICER
Fullbay

SERVICES REPAIR SHOPS PROVIDE TODAY

Fifty-six percent of shops offered in-shop repair to their customers. Mobile repair is right behind it, commanding 53% of the market.



*Responders selected all that applied

FULLBAY 


BEST PRACTICES

TOWING

On average, only 17% of repair shops offer towing services to their customers. If you're considering new revenue streams, look into offering a tow to those vehicles stranded on the roadside.


Our data doesn't show a lot of variation in services by age of shop—which suggests even newer, younger operations are trying to do it all. Instead, the services offered are more often tied to the number of techs. For example, shops with 5 to 7 techs on staff seem to offer the most services.

We also noticed that shops with more technicians are more likely to handle collision repair. On the flip side, more technicians mean a shop is less likely to deal with welding or fabrication.

RP 527A 

VENDOR SELECTION GUIDELINES FOR TOWING AND RECOVERY

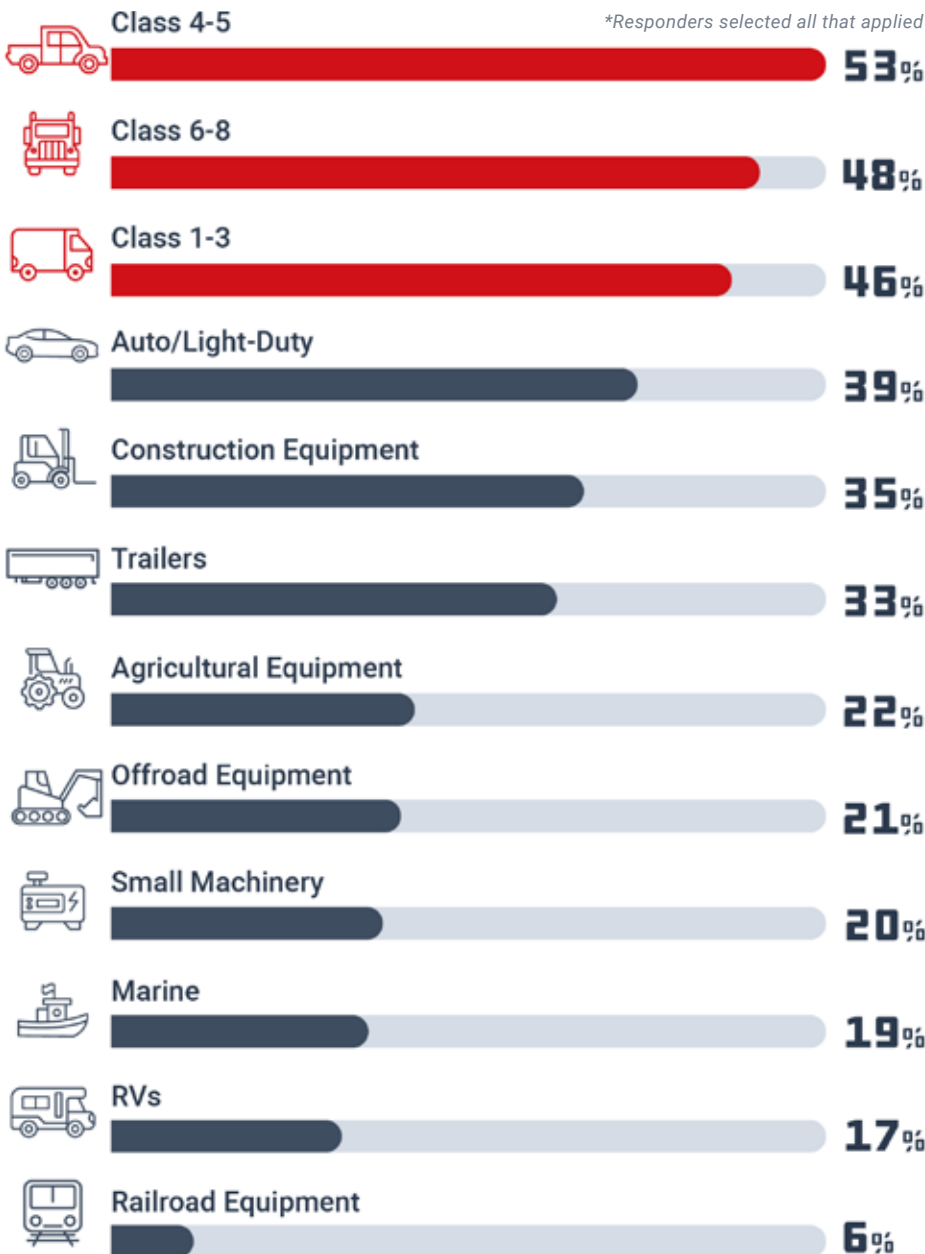
Capabilities for towing and recovery vary greatly, so TMC made guidelines on how to choose the right vendor.

 fullbay.com/RP527A

TYPES OF VEHICLES SERVICED

What are our respondents working on? Well, 53% see Class 4 and Class 5, or medium-duty trucks. Heavy-duty trucks (Class 6 through Class 8) are a close second, with 48% of the market. Class 1 through Class 3 vehicles, automobiles, and construction equipment trail behind.

Additionally, shops generally increase the number of vehicle types serviced once they employ 21 or more techs. Marine services (for boats and other floating vehicles) start to show up after a shop hires 8 techs, assuming they're located near bodies of water.



It surprised me to only see 33% of shops working on trailers. In the next 10-15 years diesel will transform into an EV industry, but trailers will still be trailers.

GLEN GRADER

OWNER/PRESIDENT

Integrity Fleet Services, Inc.



RP 1616



MOBILE MAINTENANCE SAFETY

Mobile technicians can face severe hazards when they take to the road. Proper training is absolutely essential—and it needs to start before a tech climbs into the truck. RP 1616 lays out protocols and procedures to help mobile techs operate safely.

fullbay.com/RP1616

001 HOW MUCH DID SHOPS CHARGE FOR DOT INSPECTIONS IN 2022?

A lot of shops—38%, to be exact—are charging very little for DOT inspections, if they charge anything at all. On the other end of the spectrum, 19% charge between \$251 and \$500.

A closer look at the data provided even more interesting information. The oldest shops we spoke to (those around 30+ years) charge the least for a DOT inspection (an average of \$117.30). Meanwhile, younger shops—those between three and five years old—charge the most: about \$212.



*All dollar amounts in USD.

DID YOU KNOW?



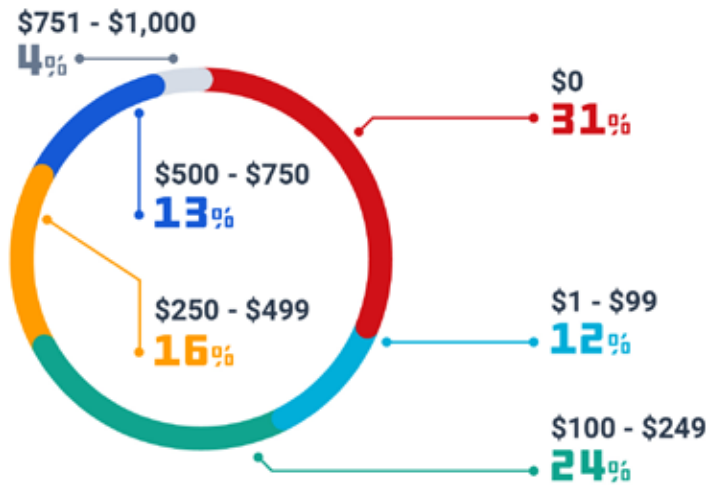
A Department of Transportation—or DOT—inspection ensures a truck is in safe operational order. You can get one from any properly licensed heavy-duty repair shop.

Diagnostic work, meanwhile, is an inspection geared toward finding out what's going on with a vehicle.

02 DID SHOPS CHARGE FOR DIAGNOSIS IN 2022?

A good chunk of shops (31%) don't charge for diagnostic work at all. The remaining 69% charge anywhere from \$1 to \$1,000 for diag.

We did some further analysis. Shops over 30 years old, once again, charged the least for diag work—\$174.70 a pop. Likewise, shops between three and five years old, again, charged the most (\$386.70).



*All dollar amounts in USD.



For shops providing a large amount of diagnosis, it is important for them to understand their overhead cost per hour. If a shop does not properly allocate cost and charge accordingly their cost of diagnosis will be higher than what the customer pays for the service.



IRVIN BOWMAN
PRESIDENT
Wayne Truck and Trailer Ltd.



BEST PRACTICES

CHARGING FOR DIAGNOSTICS

You spend time diagnosing a problem—and time is money. Why shouldn't your shop be compensated for its work? Charge appropriately for diag—it's an important service!

RP 1604



RAPID REPAIR ASSESSMENT

Are diagnostics taking up too much time? RP 1604 can help you streamline your repair assessments and get your customers' vehicles back on the road faster than ever.

fullbay.com/RP1604



TECHNICIANS.

Technicians are the ones actually wrenching in the bays—so it makes sense to look into what challenges they face, what they want in a workplace, and how to maximize their efficiency.

YOU'LL LEARN ABOUT:

- ➔ Average technician rates across the country
- ➔ How long techs are staying with employers—and in the industry
- ➔ Revenue per tech



Embrace change within the industry and the working demographic. There is a shortage of technicians, particularly experienced techs, and it's only worsening as more workers approach retirement. To grow as a business, you need to think outside the box regarding employee recruitment and retention.



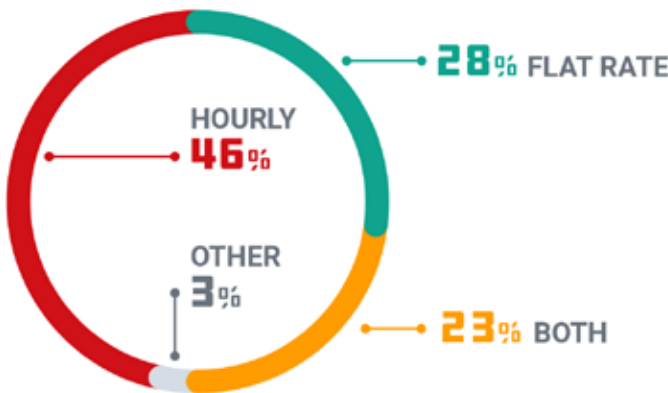
AARON PICOZZI

PRESIDENT

American Diesel Training Centers

HOW DID SHOPS PAY THEIR TECHS IN 2022?

Overall, 46% of techs were paid hourly; flat rate came in a distant second at 28%. The data tells us that the more techs a shop employs, the more payment options they offer—but those options decrease with the shop’s age. Indeed, the older the shop, the more likely it is to only offer an hourly rate.



FULLBAY

DID YOU KNOW?

Several questions in the survey were for technicians only, and were not included in the data regarding “How shops pay their techs.”

Here’s what techs have to say for themselves about how they’re being paid:

- ➔ 55% are paid hourly
- ➔ 42% receive a flat rate
- ➔ 3% indicate “other”

AVERAGE TECHNICIAN HOURLY RATES IN 2022

The highest-paid techs in the United States are in the Southeast (earning an average of \$46/hour) and the West (\$44.60). The Midwest brings up the rear, with techs there earning \$35.10 per hour, while Canada comes in at \$44.80.



*All dollar amounts in USD

TECHNICIAN FLAT RATES IN 2022

The more techs a shop employs, the higher the flat rate—usually. Keep in mind that while flat rates are tied to a job type (see sidebar), they do still work out to an amount per hour that techs are paid. Shops that employed 41+ technicians paid an average flat rate of \$63.60 per hour, while shops with 2 or fewer techs paid \$48.60 per hour.

The number of years a shop spends in business also has some impact on the flat rate. The oldest shops, interestingly, pay the lowest flat rate: \$32.80 per hour. Young-ish shops between three and five years old paid the most: \$54.90 per hour.



DID YOU KNOW?

Repair shops typically choose one of two ways to pay their techs—flat rate or hourly wage.

➔ Flat rate is tied to a job. If Job X should take a tech three hours to complete, but they finish it in two, they still get paid for three hours.

➔ Hourly wage is based on how much a tech works—they are paid a particular rate (say, \$45) per hour on the clock.

Learn more about these payment methods here:

fullbay.com/flatrate

RP 1607



TECHNICIAN CAREER DEVELOPMENT

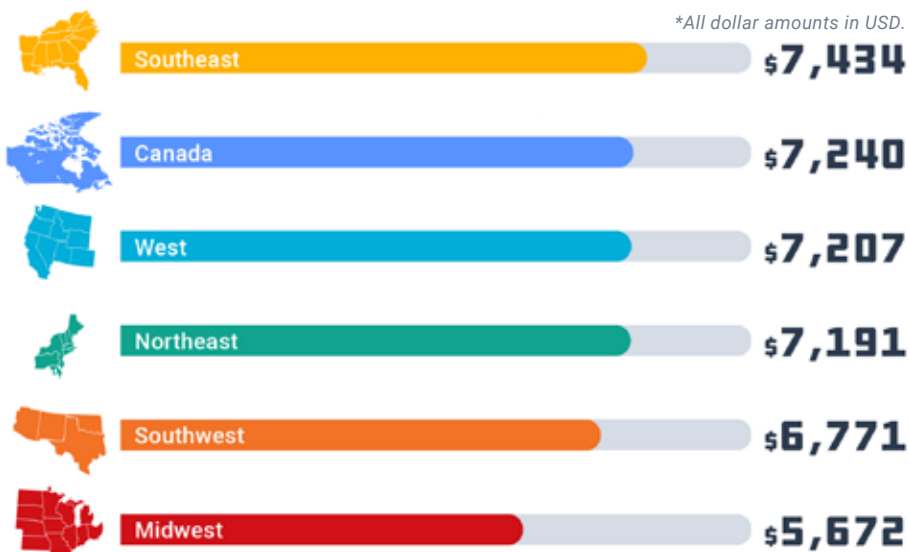
Shops with a career path tend to retain more technicians. RP 1607 helps you develop a career plan for every tech in your operation.

fullbay.com/RP1607

001 AVERAGE MONTHLY TECH SALARIES BY REGION

To determine how much techs brought home per month, we multiplied the average hourly rate by the average working hours in a month—about 161.6 hours, if you were wondering.

The Southeast also leads the pack in this area, as its techs earned an average of (pre-tax) \$7,434 per month.



HOW DID WE COME UP WITH THESE NUMBERS?

The formula for monthly tech salaries is:

TECH HOURLY RATE



161.6 HOURS



MONTHLY SALARY

RP 1614



TECHNICIAN MENTOR PROGRAM GUIDELINES

Mentoring can be an outstanding alternative to expensive training—but how do you create a mentorship program? TMC has created some guidelines.



fullbay.com/RP1614

AVERAGE MONTHLY BONUSES (FOR ALL EMPLOYEES)

The graph below covers all employees; it shows us how bonuses can vary by business type. Non-commercial repair shops, for example, seem to offer the highest bonuses (\$1,964).

Once again, the age of a shop impacts the bonuses it provides. The oldest shops don't seem to provide much of a bonus at all—\$583. Shops that range between brand-new and five years old tend to offer the highest bonuses: \$1,847 to \$2,064. The number of techs employed also seems to influence what kind of bonuses are available, as shops with 41+ techs provided an average of \$2,360 on top of regular wages.

Non-Commercial Repair

 **\$1,964**

Internal Fleet Repair

 **\$1,828**

Dealership

 **\$1,816**

Independent Repair

 **\$1,787**

Mobile Only

 **\$1,639**

Mobile & Brick/Mortar Shop

 **\$1,561**

Internal & External Repair

 **\$1,068**

**All dollar amounts in USD.*

00 HOW MUCH DID SHOPS INCREASE HOURLY WAGES FOR TECHS IN 2022?

We looked into the average hourly raises technicians received in 2022. Ready for some surprising facts? Shops that employ the lowest number of techs also handed out the smallest raises (averaging a \$3.10 per hour increase). Meanwhile, the biggest shops—employing 41 or more techs—increased their hourly rates by an average of \$8.20.



*All dollar amounts in USD.

RP 519



RECOMMENDATIONS FOR EMPLOYEE PERFORMANCE EVALUATION PROGRAM

Regularly assess your staff to ensure the right people are in the roles you've assigned them. You can learn more about evaluating your crew from TMC/ATA.

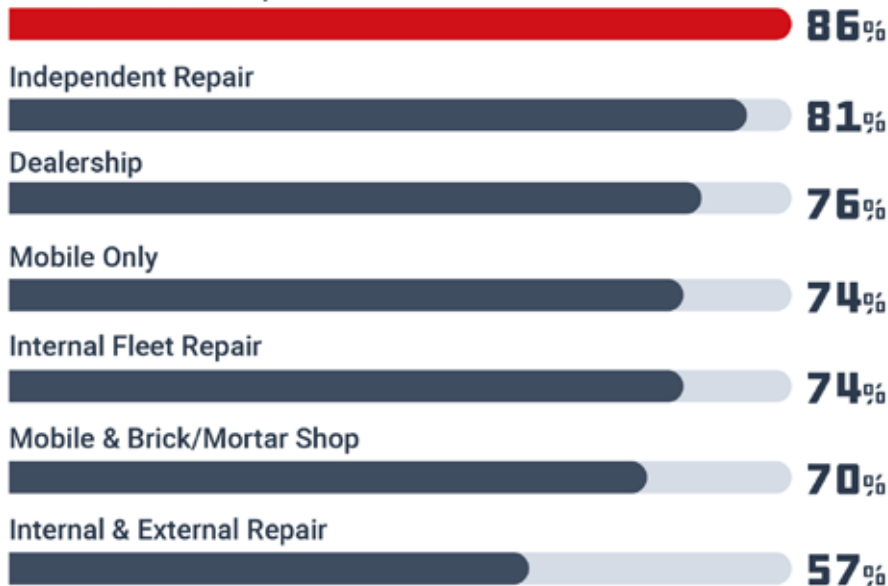
fullbay.com/RP519

AVERAGE EFFICIENCY IN 2022

The data suggests tech efficiency is tied to the size and age of the shop. Shops that have been in operation for 30 years or more, for example, reported an average of 58% efficiency, while shops 10 to 15 years old reported 85% efficiency.

The type of work shops are engaged in also seems to impact efficiency. We found that non-commercial repair shops reported 86% efficiency, but internal/external repair only reported 57% efficiency.

Non-Commercial Repair



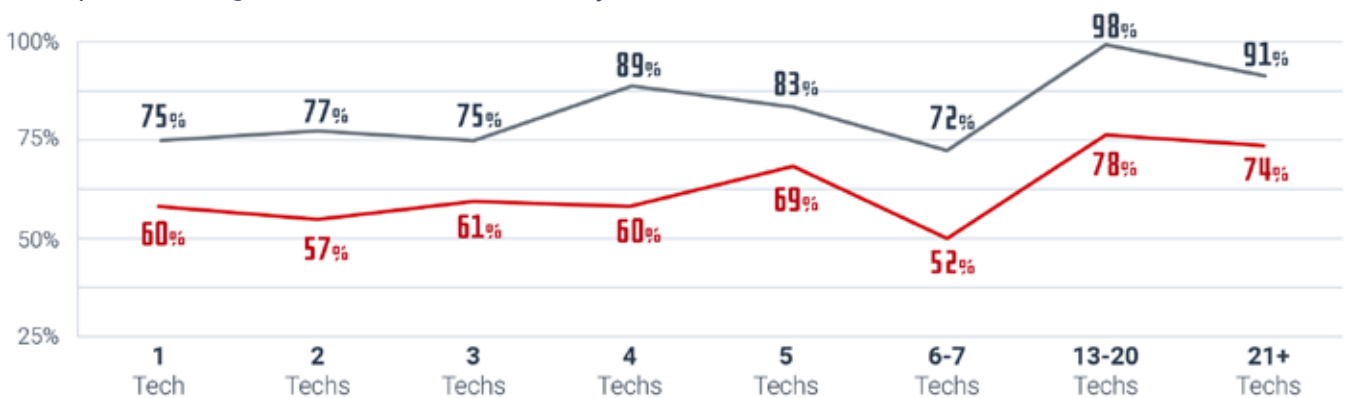
BEST PRACTICES

Tech efficiency and productivity are separate (but related) concepts—efficiency is how quickly a tech does a job, while productivity is how many jobs that same tech can do in a day. Ideally, you want high efficiency and high productivity. Find out how to measure and improve both:

fullbay.com/efficiency

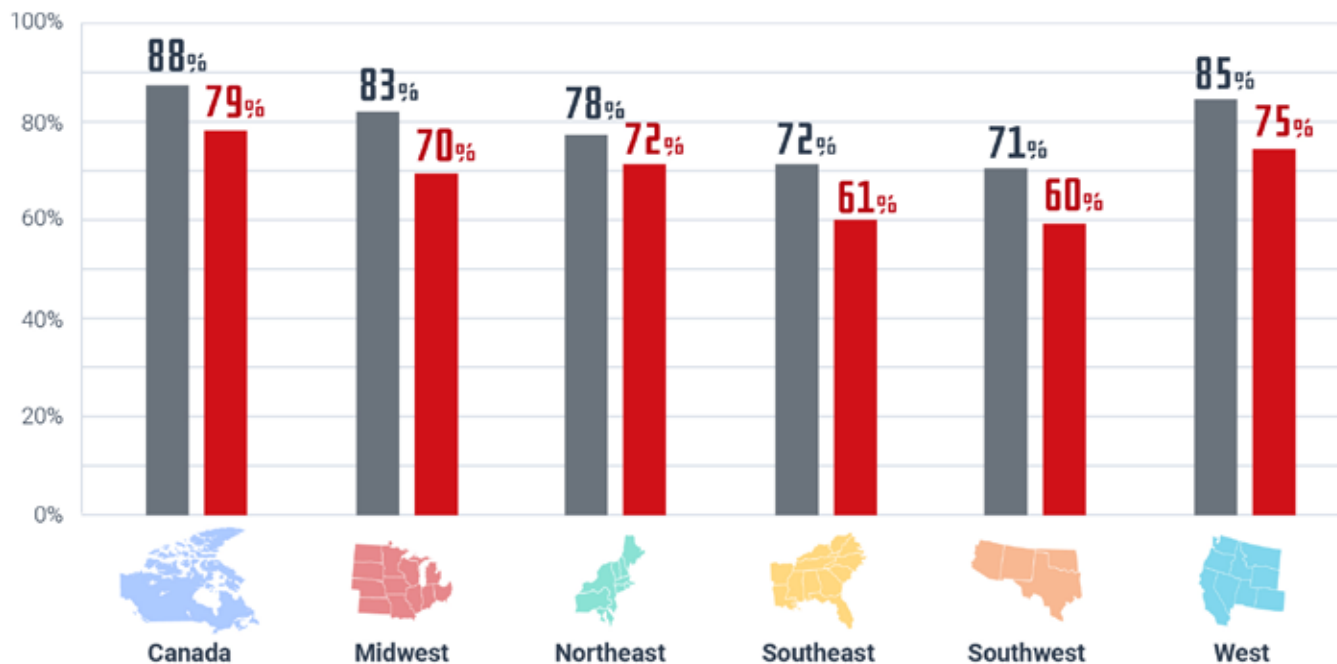
TECH EFFICIENCY AND UTILIZATION

We hit up Fullbay’s database again to look into average tech efficiency and utilization numbers. We want to emphasize that this data is averaged. Some shops will see much higher tech efficiency and utilization; others will see lower. Efficiency clocked in at an average overall rate of 84%, while utilization reached an average of 66%. Interestingly, the more techs a shop has, the higher the metrics for efficiency and utilization!



TECH EFFICIENCY AND UTILIZATION IN 2022

■ Efficiency
■ Utilization



Efficiency follows utilization. We focused on getting our technicians to at least 80% utilization. From there it was easier to increase overall efficiency. All the added efficiency drops straight to our bottom line.

GLEN GRADER

OWNER/PRESIDENT
Integrity Fleet Services, Inc.



YEARS WITH CURRENT EMPLOYER AND YEARS IN INDUSTRY

Though the industry is still in the middle of a shortage, the techs that remain are often very loyal. We asked technicians how long they'd been with their employer; those who responded said they've been with their current employers for an average of six years, and have spent an average of 12 years in the industry overall.



24 Or Less Years Old



25 - 34 Years Old



35 - 44 Years Old



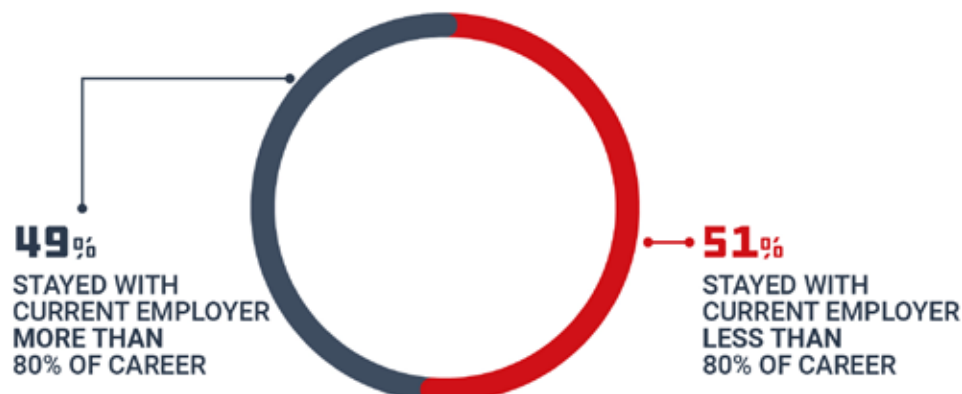
45 - 54 Years Old



55+ Years Old

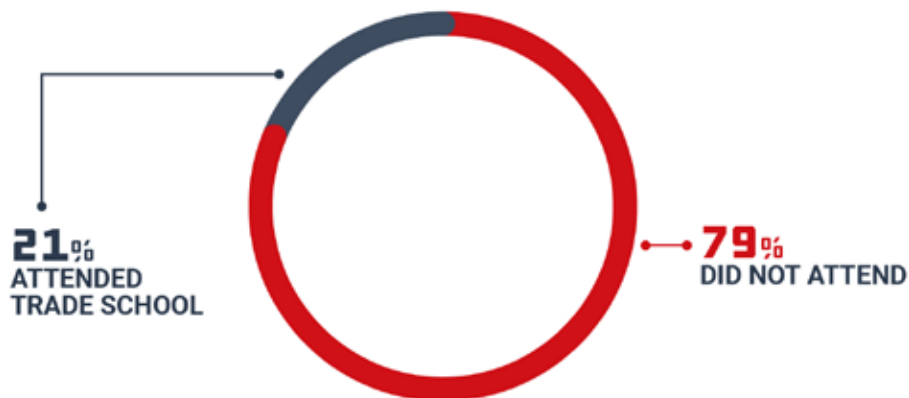


Just under half of all our respondents have spent almost their entire career at one shop!



TRADE SCHOOL

Trade school is often pushed as a funnel to get people into the diesel industry, but it hasn't been heavily utilized by the current crop of techs—only 21% of our respondents had attended. Of those who attended, 44% of them were 55 and older. Possibly this is due to these techs attending trade school before the four-year university push of the 1980s and onward.



Trade schools help provide a foundation, but they are not a requirement to enter the industry as a technician. Having a good attitude and showing up to work is more than half the battle. You can learn a lot just by working alongside senior technicians. If you want to enter the industry with no school debt, check if your local shops will bring you on as a helper.



AARON PICOZZI

PRESIDENT

American Diesel Training Centers

RP 528



TECHNICIAN CERTIFICATION PROGRAM

Certifications are an excellent way to develop and retain your talent. RP 528 shows you how to create a program that will keep your techs around for years.

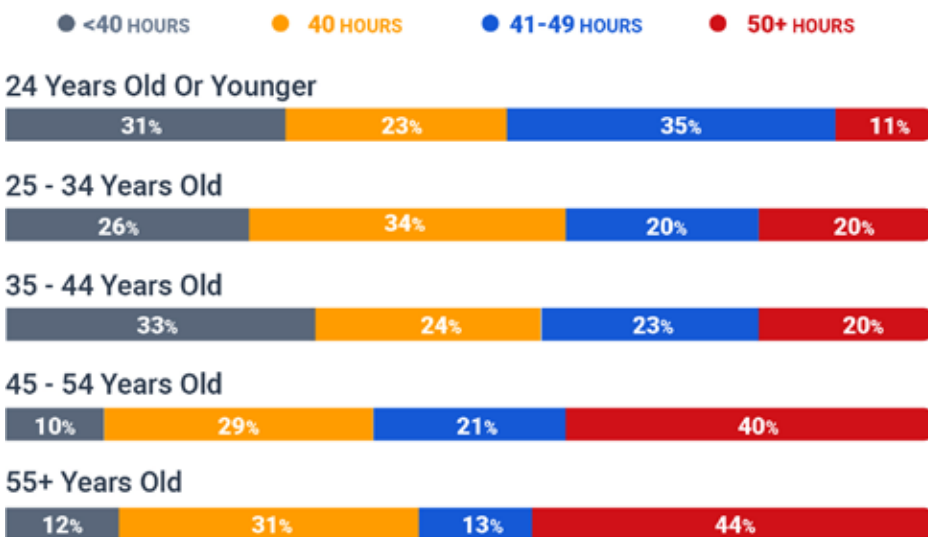
fullbay.com/RP528

TECH HOURS PER WEEK

The following numbers are self-reported by technicians:

Forty-five percent of techs reported working more than 40 hours per week. On top of that, 23% are working over 50 hours.

We also looked at hours worked by age. In general, the older techs are working longer hours, with 44% of techs age 55 or older working 50+ hours a week. In contrast, only 11% of the youngsters (24 years old and below) are putting in more than 50 a week.

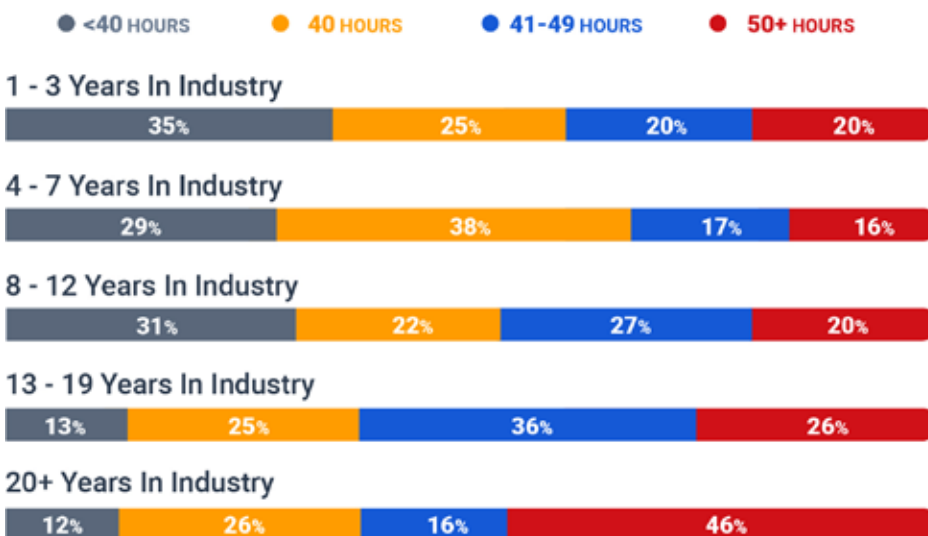


Hours worked based on what generation they fall into is telling. Young people desire scheduling flexibility, and parental responsibilities have changed over the years. There are still lots of young people that want to work as many hours as they can, but don't assume they all do. It's important to listen to each tech as an individual and come up with a plan to accommodate them where possible.



JAY GONINEN
FOUNDER & PRESIDENT
WrenchWay

This is backed up by how long a tech works in the industry. Forty-six percent with 20+ years in diesel under their belts are working 50+ hours a week.





INVENTORY MANAGEMENT.

A shop's profitability can largely come down to how it handles its parts. The ongoing shortage can make things challenging, though—here's how many parts managers are coping.

YOU'LL LEARN ABOUT:

- ➔ How many shops are turning to new vendors
- ➔ How long it takes to get parts
- ➔ Whether shops are using OEM or aftermarket parts



Inventory can make or break your shop, and it's becoming an even more difficult needle to thread when balancing carrying costs with the ability to get parts in a timely fashion.



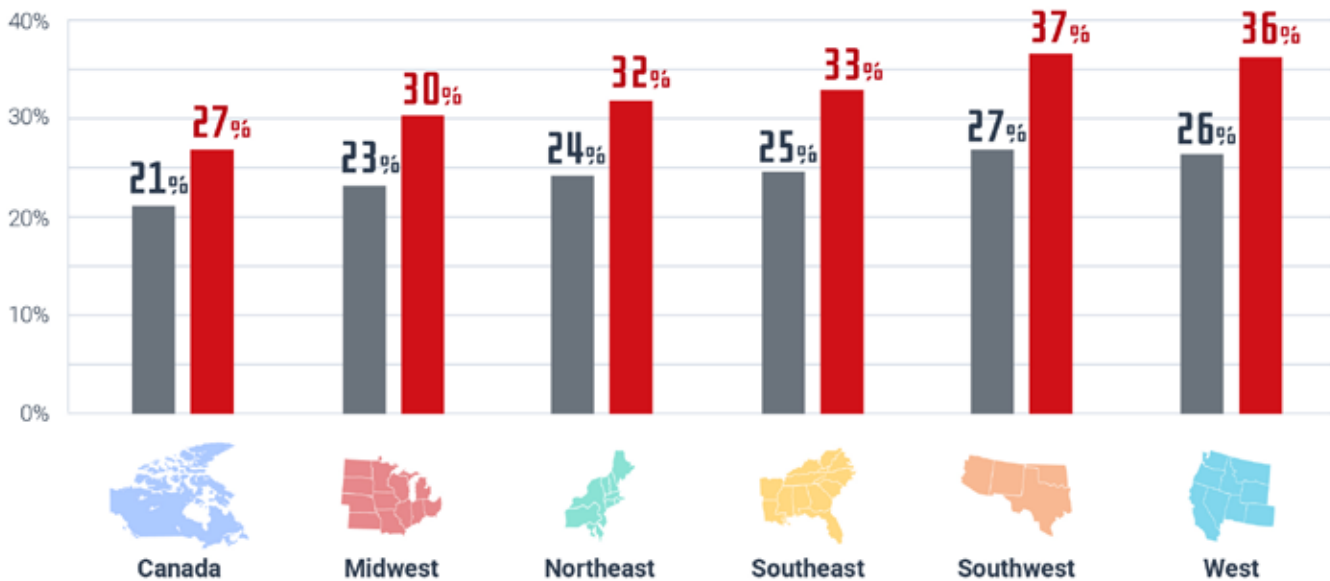
JACOB FINDLAY
CO-FOUNDER &
EXECUTIVE CHAIRMAN
Fullbay

AVERAGE PARTS MARKUP AND MARGIN

Data points to higher parts markups in the Southwest (37%) and the West (36%). These numbers are very similar to their 2021 equivalents (37% and 39%, respectively).

Margins, however, were considerably different. In 2021, the Southwest recorded 20% margins; in 2022, it was up to 27%. The West, by comparison, spent 2021 at 17% and moved up to 26% in 2022.

■ **Margin**
■ **Markup**



DID YOU KNOW?

PARTS MARKUP

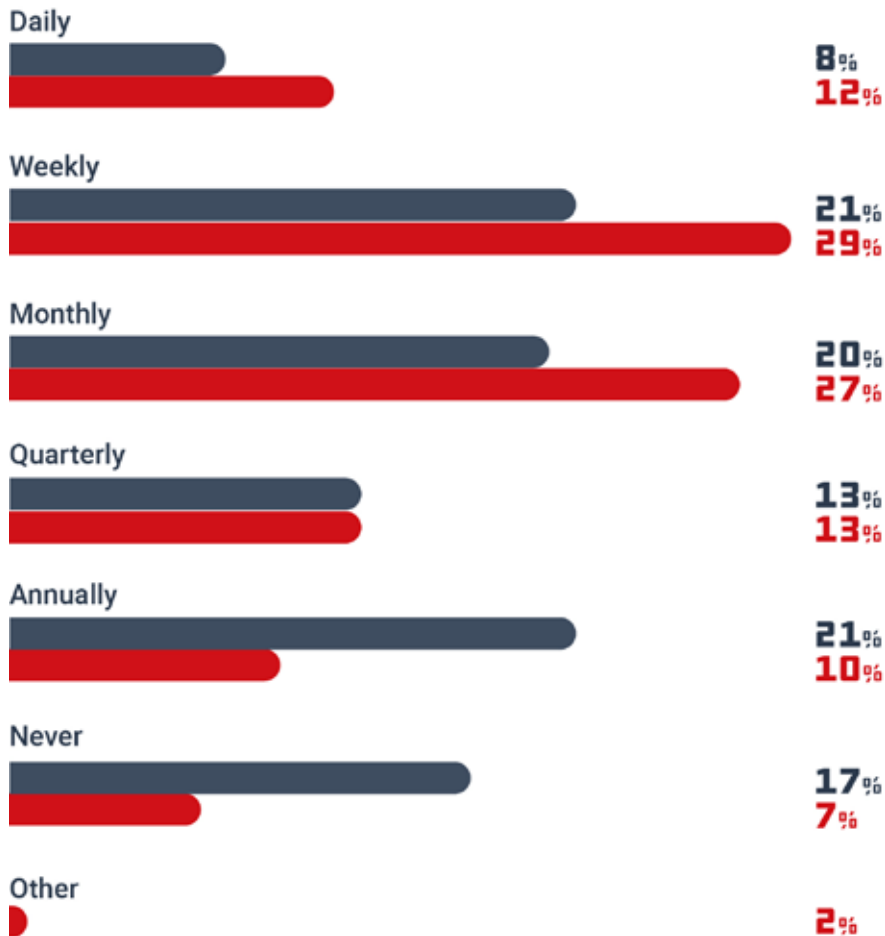
Not sure how to mark up your parts? We have a free tool:

fullbay.com/markup

PERFORMING INVENTORY COUNTS

We continue to see shops performing more inventory counts. In 2021, 49% of respondents said inventory counts happened at least monthly; In 2022, that number (covering daily, weekly, and monthly counts) inched up to 68%. We also saw that fewer shops avoided them entirely—in 2021, 17% didn't bother with inventory counts. In 2022, that number dropped to 7%!

■ 2021
■ 2022



BEST PRACTICES

Tracking your inventory properly helps you run a more profitable shop—it's hard to recoup money if parts are just wandering off! If you've had a hard time getting started with inventory counts, just follow the ABCs:

A: Fast-moving parts that you need to restock frequently—count these at least once a month!

B: Parts that sell regularly but not at great speed—you can count these quarterly.

C: These parts may sit on a shelf for months at a time! You can usually count these every six months.

Find out more:

fullbay.com/inventorycounts

RP 1605



JUSTIFICATION FOR A PARTS & SERVICE ASSISTANT

Maximizing your shop's efficiency means keeping your techs turning wrenches instead of rummaging through the parts department. RP 1605 offers guidelines for hiring a parts assistant.

fullbay.com/RP1605

ARE YOU ACTIVELY MANAGING CORES?

Eighty-three percent of shops are managing their cores. This is a great new high—up from 76% in 2021 and 76% in 2020.

That does mean that the other 17% of this 2022's respondents either didn't manage cores or only managed them occasionally. That's not a number we like to see, though it's an improvement over 2021 (24%) and 2020 (24%).

Additional data tells us that the shops with 4 or less techs, along with shops that have been operating for over 16 years, are doing the best job of core management—they send dirty cores back right away.

- Occasionally
- Yes
- No

2020



2021



2022



RP 1615



PARTS CORE MANAGEMENT FOR SERVICE PROVIDERS

Properly handling your cores can lead to an additional revenue stream for your shop. Check out TMC/ATA's RP 1615 to learn how to improve this operation in your shop.

fullbay.com/RP1615



BEST PRACTICES

A core is basically a used part—and if a vendor sells you a part with a “core charge,” you can return it to them for a fee when its life cycle is complete. New line of revenue, anyone? Learn all about it here:

fullbay.com/partcores

WHAT IS YOUR SHOP'S FILL RATE?

Just over 44% of the time, shops report that they are able to order and receive a part on the same day. We do see that as the number of techs employed increases, the same-day fill rate increases along with it. This is especially prevalent in shops with 41 or more techs—they have a 59% same-day fill rate.

We did notice some interesting regional differences. Canadian shops average a 35% fill rate, while various regions in the United States lingered in the 40% range.



We've spent too many years struggling to get our inventory dialed in. Doing simple cycle counts goes a long way toward knowing what you have and what you need.

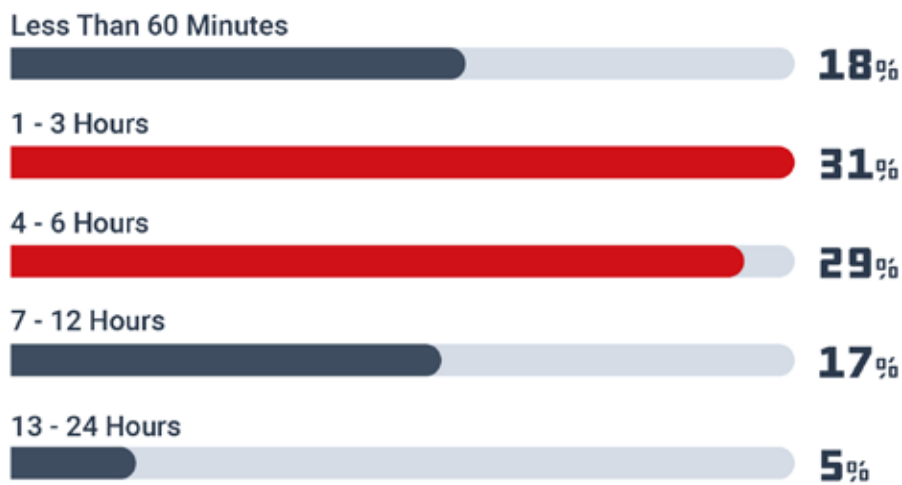
GLEN GRADER

OWNER/PRESIDENT
Integrity Fleet Services, Inc.



🔧 TIME TO SOURCE AND PLACE AN ORDER FOR A NON-STOCKED PART

The majority of our respondents told us it takes between one and six hours to place an order for a part that isn't in stock. Just 31% of the parts managers who responded said it took between one and three hours; 29% said it took between four and six hours. Meanwhile, 5% needed 13 to 24 hours to find and order a part.



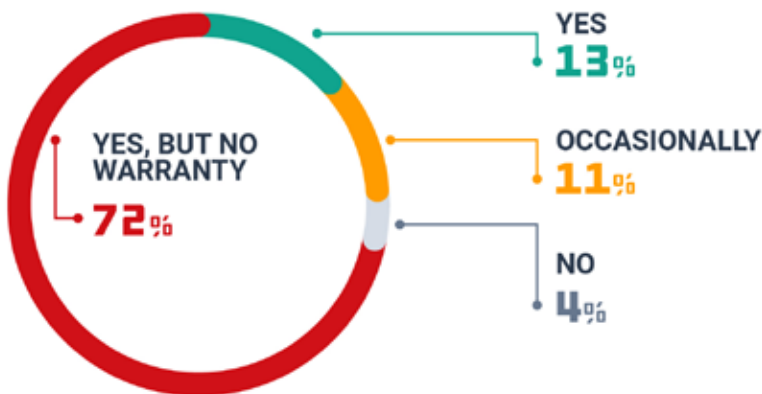
ARE YOU PURCHASING MORE THAN YOU WOULD NORMALLY DUE TO THE PARTS SHORTAGE?

The difficulty associated with obtaining new parts has made parts managers and shop owners a bit likelier to stock up when they have the chance. Only 12% purchase just what they need; 46% will purchase what they need and a little more, while 29% will purchase what they need and a lot more.



DO YOU ALLOW CUSTOMERS TO BRING THEIR OWN PARTS?

The vast majority of shops—85%—permit customers to bring in their own parts. Most of them (72%) won't provide a warranty, however. Only 4% of respondents flatly refuse to allow a customer to bring in their own parts.



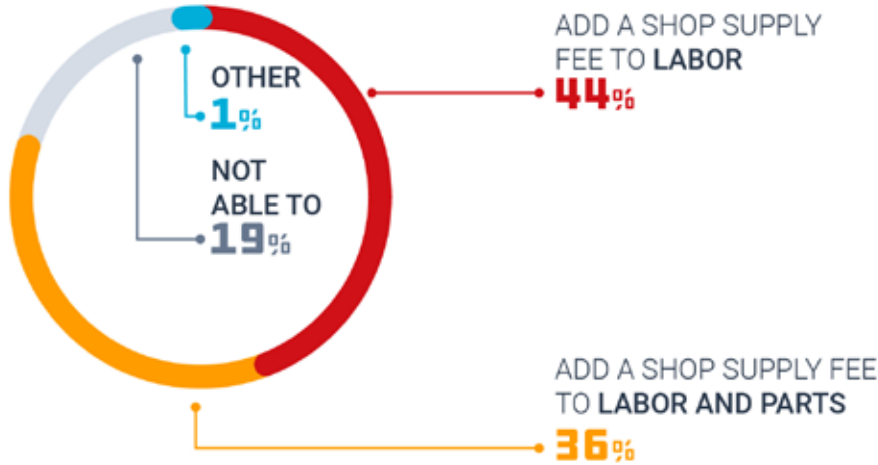
BEST PRACTICES

The parts shortage has led some shop owners to come up with creative ways to ensure they have the parts their customers need ready to go. Sometimes that means buying a little more of a part than usual... sometimes it means buying a lot more. Find out more about parts hoarding (and other tactics) here:

fullbay.com/hoarding

RECOUPING COST OF SHOP SUPPLIES

Eighty percent of shops are passing a fee on to customers through labor and/or parts.



FULLBAY

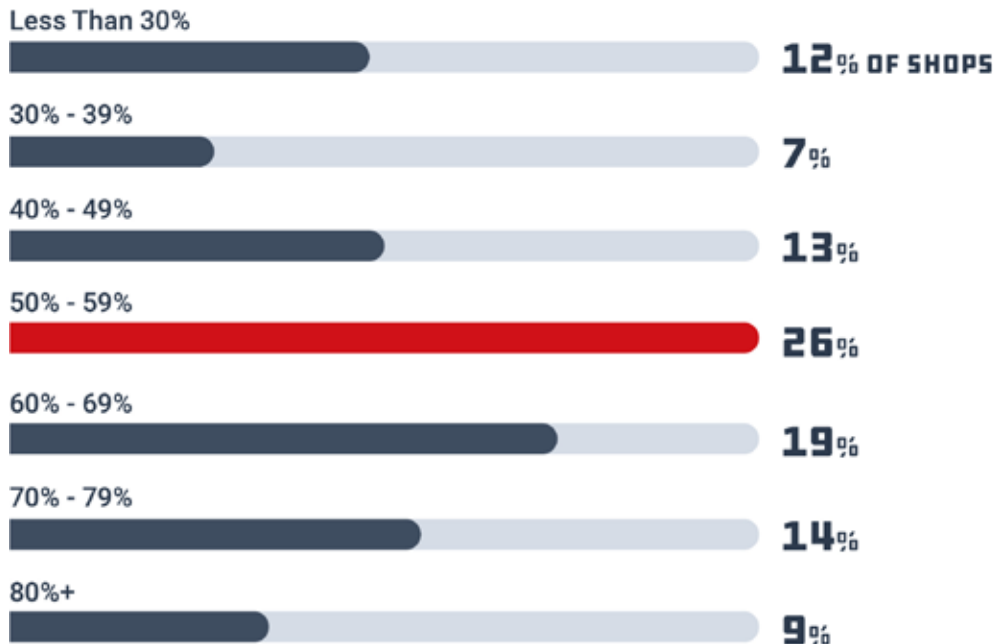
BEST PRACTICES

INTEGRATED PAYMENTS

Commercial repair shops end up losing far too much money by simply accepting certain expenses as a cost of doing business. But those costs can add up, eventually costing your operation thousands of dollars over the years. Fullbay Payments lets you pass costs like shop supplies or credit card fees on to your customers—helping you stay in the black.

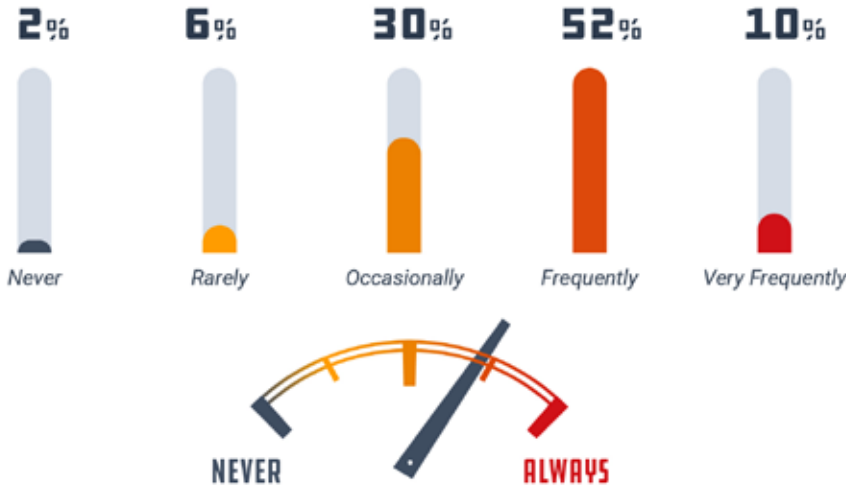
WHAT PERCENTAGE OF YOUR PARTS IS OEM?

Sixty-eight percent of respondents report that 50% or more of the parts they bring in are OEM.



HOW MANY SHOPS ARE PURCHASING PARTS FROM OUTSIDE THEIR NORMAL SUPPLIERS?

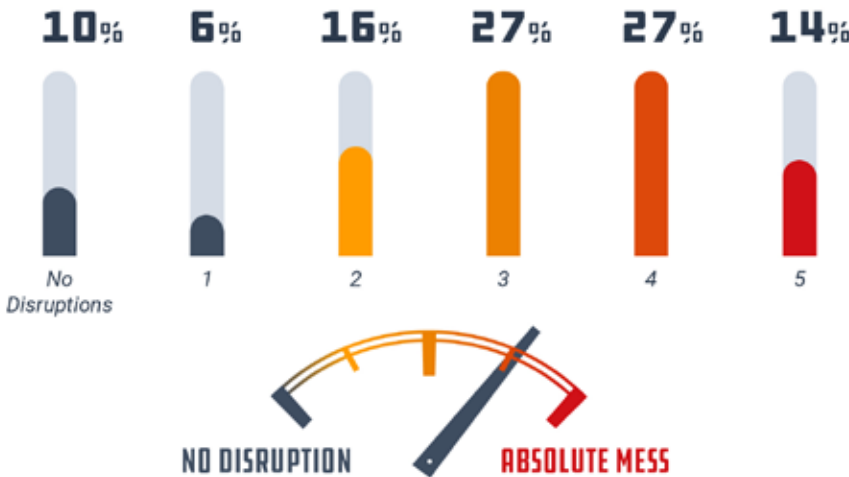
The parts shortage continues to be a problem. In 2021, 45% of shops reported venturing outside their usual supply vendors “frequently” or “very frequently.” In 2022, that number ticked up to 62%.



HOW MANY SHOPS ARE FACING A DISRUPTION DUE TO THE PARTS SHORTAGE?

We asked shops to assign a numerical value to the difficulty they experienced obtaining parts; a “1” meant low or no difficulty, whereas a “5” meant getting parts was extremely challenging.

As you can see from the data, shops are still running into snags as they try to source the parts they need. Still, they’re at least managing to get those parts—in 2021, 17% of shops reported the shortage left them in an “absolute mess,” but in 2022, that grim metric dropped to 14%.



RP 1611

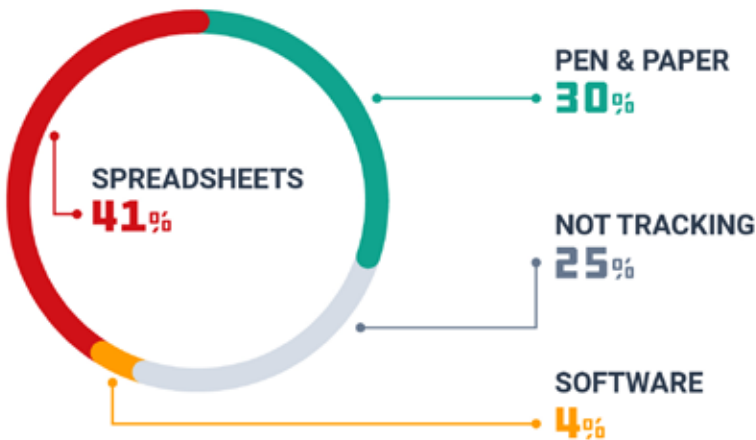
PARTS ACQUISITION FOR SERVICE PROVIDERS

If you’re having trouble sourcing parts, make sure you’re exploring all your options. RP 1611 shows you how to create a process that will help your staff get the parts they need—even when they’re out of stock.

fullbay.com/RP1611

TRACKING LOST PARTS

The majority of our respondents use spreadsheets or a pen and paper to track lost parts, while 4% are using software to do so. Unfortunately, a quarter of shops don't track lost parts at all.



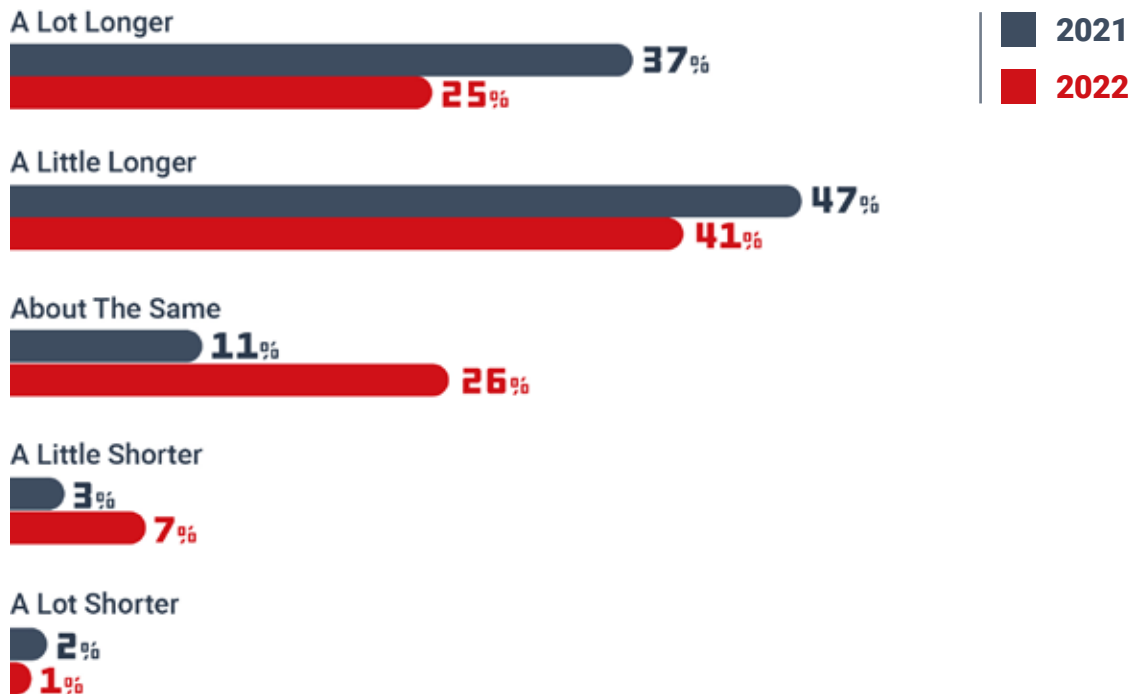
FULLBAY

BEST PRACTICES

Are you losing sales because you don't keep the right parts in inventory? Tracking lost parts will show you what parts you should keep stocked.

HOW LONG DID IT TAKE SHOPS TO GET PARTS IN 2022?

The supply crisis that accompanied the pandemic may be slowly receding, but parts can still be difficult to come by. A full 66% of respondents told us that they had to wait a little or a lot longer for non-stocked parts to arrive. Only 8% said things got to them faster.





RUNNING YOUR SHOP.

Running a repair shop isn't just about the wrenching—a whole lot of work also goes into bookkeeping, marketing, and other parts of the business.

LET'S TALK ABOUT:

- ➔ Repair shop websites—who has them, and who needs them?
- ➔ Whether shops plan for succession
- ➔ How much time is spent on repairs



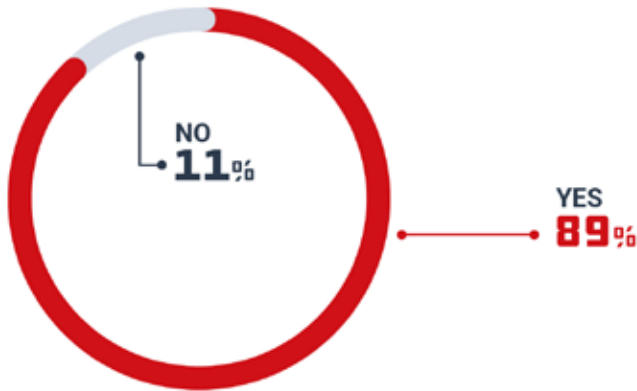
Measuring your data helps you understand where to improve running your shop—for example, order creation to invoice or time spent at each stage of the repair. If we can measure where we fall short or do well, then we can focus our time and resources in the proper places.



JIMMY WALL
GENERAL MANAGER
Donahue Truck Centers

DOES YOUR SHOP HAVE A WEBSITE?

Eighty-nine percent of the shops surveyed reported having a website. That's great news! It does, however, mean 11% of shops don't.



Of the shops that do have websites, 25% report receiving 11 to 15 leads per month through it, and just over 17% tell us their website generates 20+ leads per month.



FULLBAY

BEST PRACTICES

YOUR WEBSITE SERVES MULTIPLE PURPOSES

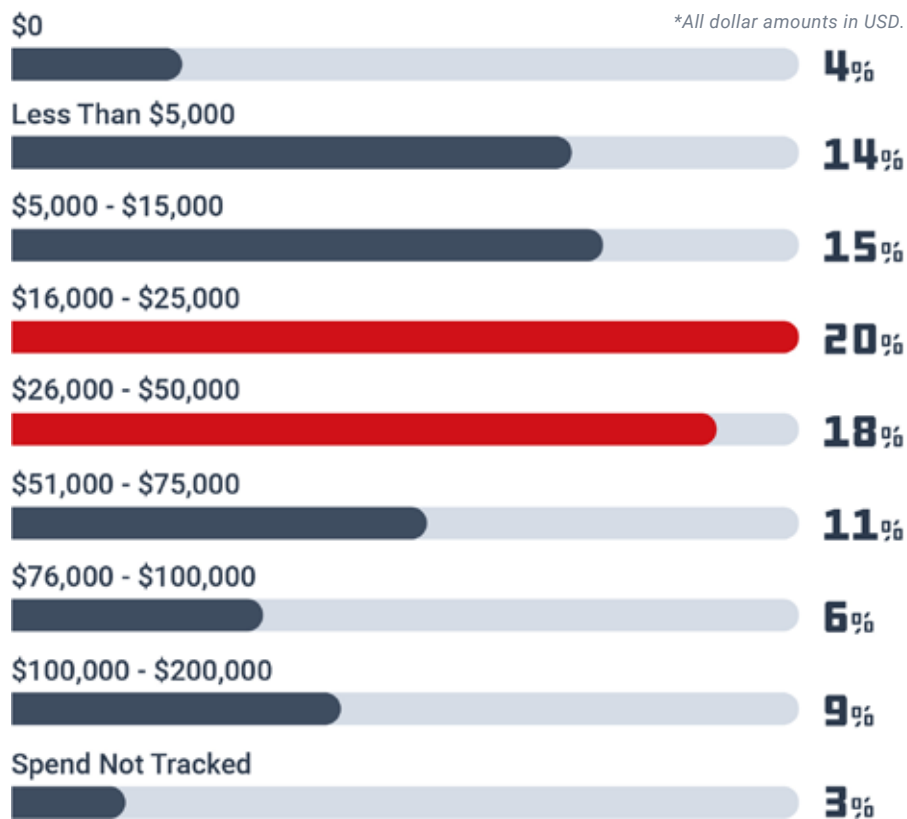
A good website isn't just about attracting customers. As your digital shopfront, it can also help you recruit technicians—which, as this report shows, is one of the biggest challenges in the industry.

If you want a website but aren't sure where to start, we can build one for you!

fullbay.com/yourwebsite

ANNUAL MARKETING SPEND IN REPAIR SHOPS

Marketing is critical for any commercial repair shop, but actual spend is quite spread out. We found that a narrow majority of 20% of shops spend between \$16,000 and \$25,000 per year on marketing efforts; 18% invest just a bit more, \$26,000 to \$50,000. That does still leave 4% who don't spend anything on marketing, as well as 3% who do spend something but don't track it.



BEST PRACTICES

An outstanding shop website will do a lot for your shop...but it's just the beginning. It's the twenty-first century; if you want to regularly pull in new customers, you're going to have to improve your digital marketing. We've compiled a roundup of our favorite advice to help you do just that:

dieselmatic.com/marketingroundup



BEST PRACTICES

Don't just track your spending—make sure you know what your dollars are doing! Dieselmatic's powerful dashboard shows you exactly where your money is being spent and what your return on investment is. No guessing games, no extensive math—just the information you need to make the right marketing decisions.

fullbay.com/dmdashboard



Shops should invest in marketing. Marketing is instrumental in the success of a business in the long term.

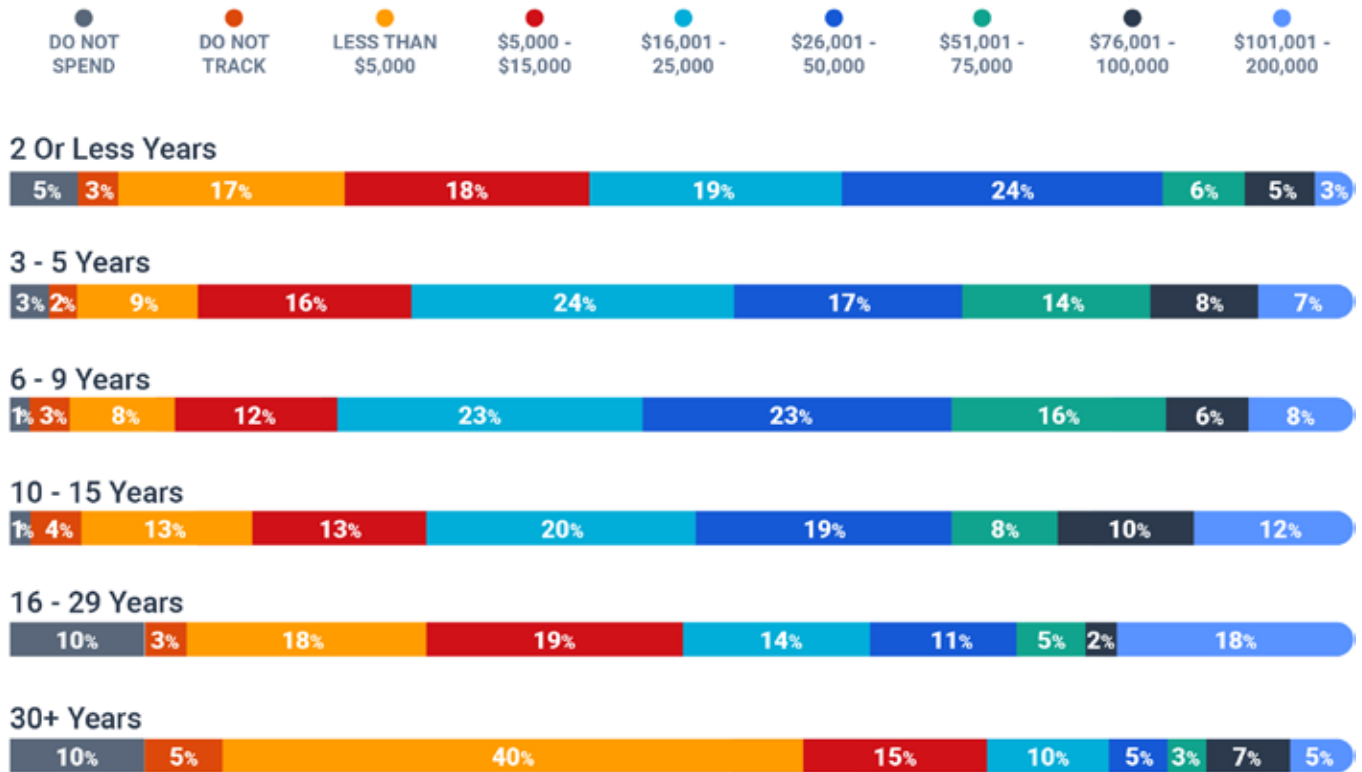


JIMMY WALL
GENERAL MANAGER
Donahue Truck Centers

ANNUAL MARKETING SPEND BY SHOP AGE

Now, let's talk about shop ages. We do notice that middle-aged shops (six to nine years old) and younger shops (up to two years old) put between \$16,000 and \$50,000 toward marketing, on average, per year. Some operations do spend more—sometimes a lot more: 8% of middle-aged shops drop \$101,000 to \$200,000 on marketing per year!

**All dollar amounts in USD.*



Investing in marketing is more than just bringing in new business—it can also help you recruit. A little marketing can go a long way in making you stand out to techs.

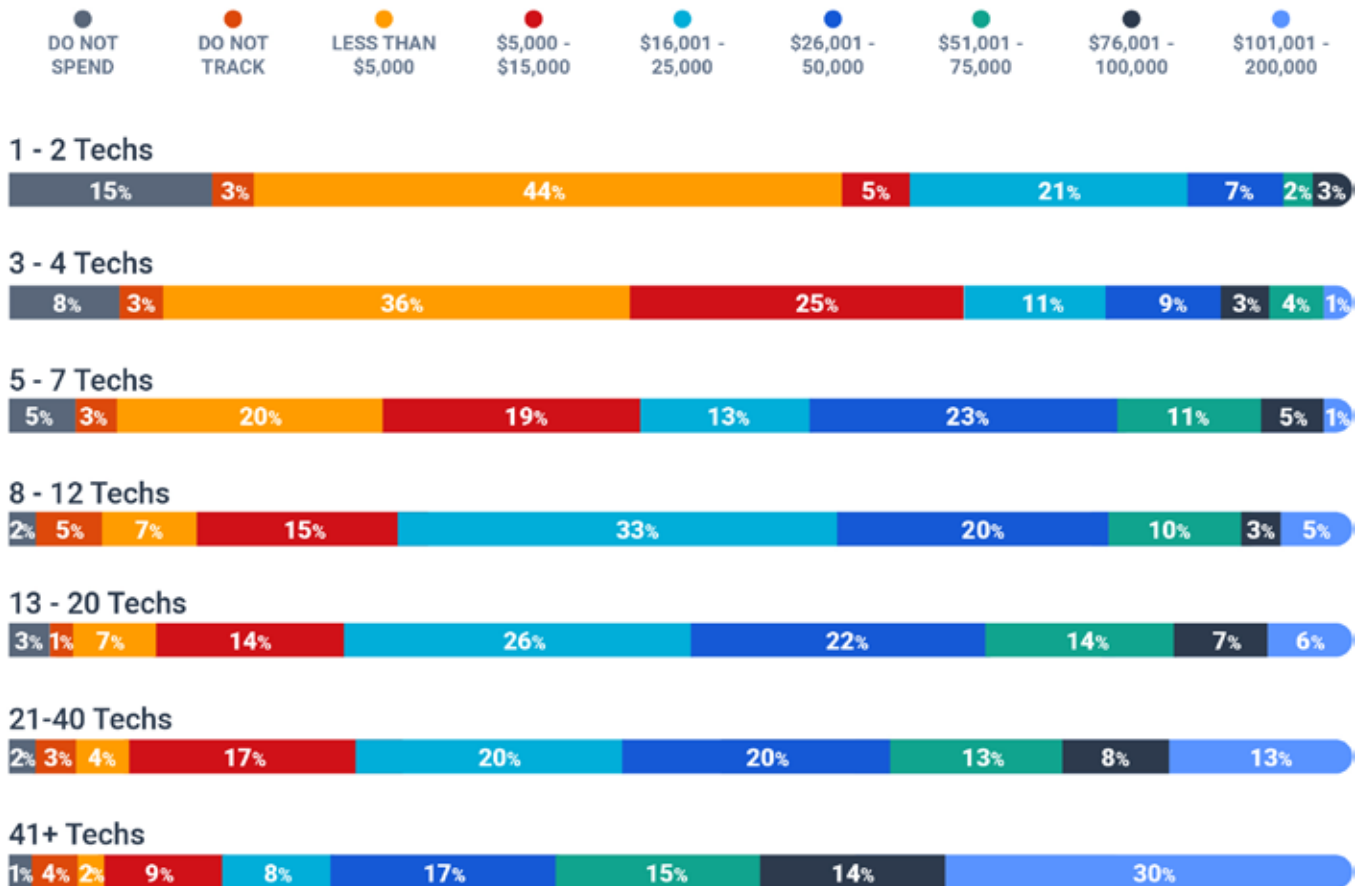


PATRICK MCKITTRICK
CHIEF EXECUTIVE OFFICER
Fullbay

ANNUAL MARKETING SPEND BY NUMBER OF TECHS

We also looked at the data through the lens of shop size. As you can see from the graph below, the more techs a shop employs, the more they spend on marketing.

**All dollar amounts in USD.*



Marketing starts with awareness. If your audience doesn't know who you are, they'll never become your customers.



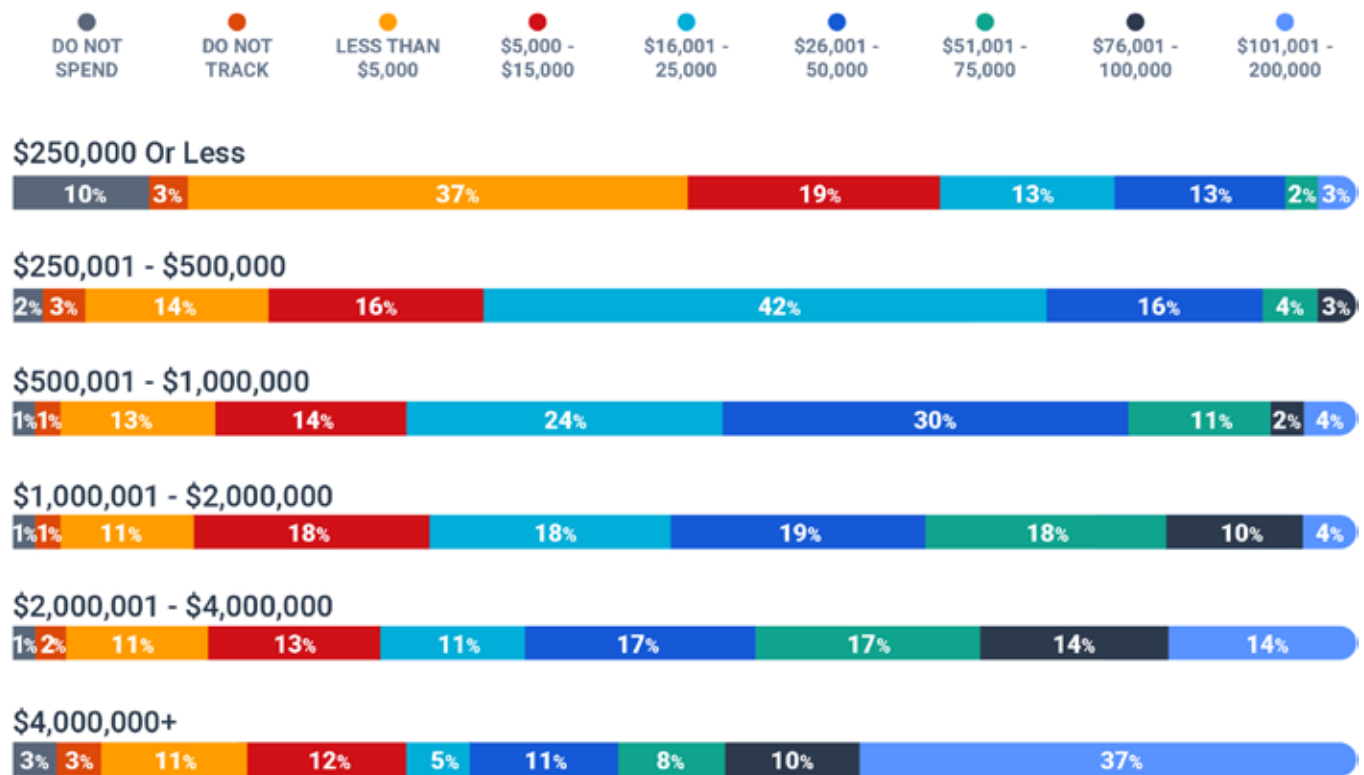
NICK ADAMS
 MANAGING DIRECTOR
 Dieselmatic Digital Inc.

ANNUAL MARKETING SPEND BY GROSS REVENUE

What you make can certainly impact what you spend—until a shop is making about \$1 million in revenue. Once that happens, shops tend to spread out their marketing money evenly until they reach \$4 million.

Thirty-seven percent of shops that pull in more than \$4 million are spending about \$100,000 or more on their marketing.

**All dollar amounts in USD.*



DIESELMATIC

PREMIUM WEBSITES & DIGITAL MARKETING

GROW YOUR DIESEL REPAIR SHOP



**Dieselmatic is a digital marketing solution
built for heavy-duty truck repair shops**

DIESELMATIC.COM

AVERAGE TIME SPENT ON EACH STAGE OF REPAIR

AVERAGE TIME SPENT STARTING A SERVICE ORDER

Let's start from the beginning: Most shops take around two to three days to begin a repair—except in large operations, as shops with 21 or more techs report starting within 1.7 days.



The information across **ORDER CREATION TO INVOICE** and **LAST ENTRY TO INVOICE** clarifies how much time is spent between the order creation and invoicing. While a shop with one tech might spend 7.5 days on the last entry to invoice, those 7.5 days are contained within the 9.7 days that the shop needed to go from order creation to invoice.

We also looked at start times by region; Canada wins here, starting repairs in two days, while the Western region of the United States takes up to 2.7 days to get started.



AVERAGE TIME SPENT ON ORDER CREATION TO INVOICE

The average time it takes to invoice after an order is created is just over seven days, though we do see some take up to 12.5 days. Shops with 13 to 20 techs take just over 11 days; there's then a steep drop to 7.4 days for shops with 21+ techs. Shops with three techs took the longest (12.5 days).



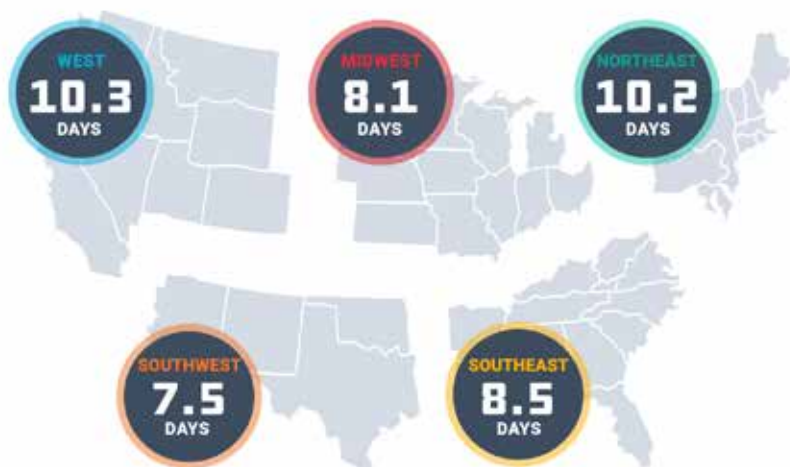
Accurate, timely, and detailed billings that reflect actual costs and investments are incredibly critical in a time of rapidly changing business dynamics. Trusted partners want to know you're on top of your game.



DON DOTY

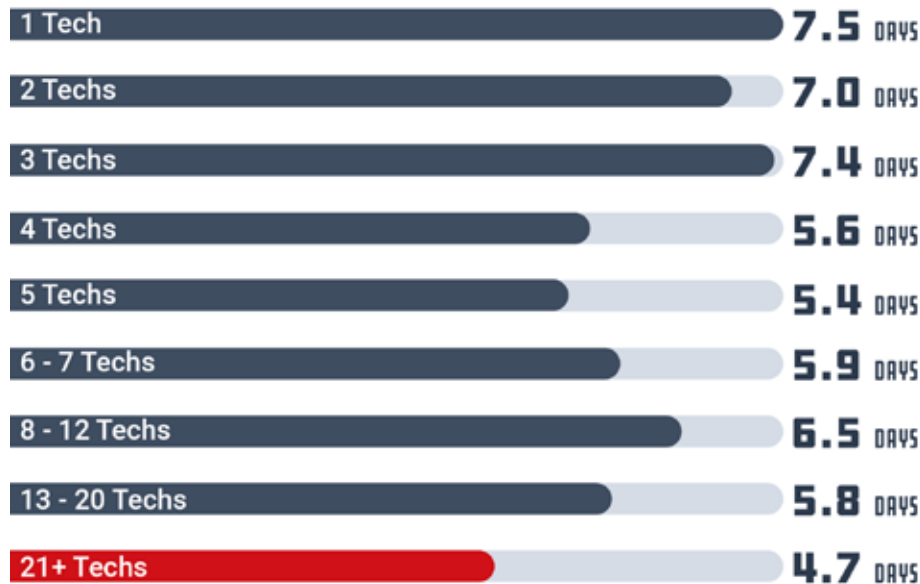
VICE PRESIDENT OF
THE SERVICE PROVIDER
NETWORK
FleetNet America®, Inc.

We also took a look at regional differences in invoicing. The Southwest came in first, taking an average of 7.5 days to go from order creation to invoice. Shops in the Midwest were close behind, requiring an average of 8.1 days to complete the process. Canada took the longest, needing an average of 13.8 days to get their invoicing underway.



AVERAGE TIME SPENT ON LAST ENTRY TO INVOICE

While order creation to invoice looked at the full repair process, we also were interested in learning how long it took to create an invoice after techs finished making repairs. We found that shops with 1 tech took the longest to create that invoice, averaging 7.5 days (we will note, however, that shops employing 3 techs had a similar invoicing delay—they averaged 7.4 days). Meanwhile, shops with 21+ technicians tended to invoice the fastest.

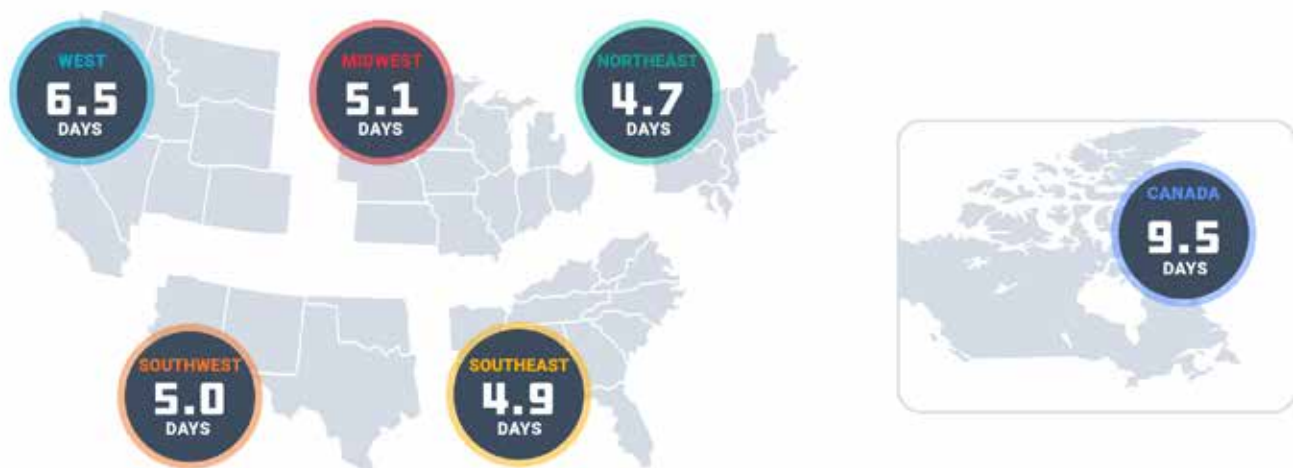


I found it interesting that 7.5 days to invoice from the last entry was about the average for shops with less than 21 techs. This is an area we can perform better as an industry if we measure it and work on it.



JIMMY WALL
GENERAL MANAGER
Donahue Truck Centers

Regionally, we discovered that Canada had the longest delay in the actual creation of the invoice; Canadian shops needed an average of 9.5 days from the last entry to invoicing the customer. The fastest region? The Northeast, taking just 4.7 days to invoice.



AVERAGE INVOICE SIZE IN 2022

We approached invoicing from two angles: by tech and by region.

Interestingly, shops with over 21 techs reported the lowest average invoice size (\$727). Meanwhile, shops that employed 4 techs commanded the highest average invoice size of \$1,141.



**All dollar amounts in USD.*

OVERALL AVERAGE INVOICE SIZE: **\$965**

We also looked at regional data and found that Canada had the largest average invoice size (\$1,242). The United States did not even crack \$1,000 per average invoice, ranging from the mid-\$800s to the high \$900s.



**All dollar amounts in USD.*

AVERAGE SOAI INVOICE SIZE IN 2022

Are you curious about what the average is for each action item on a service order (SOAI)? So were we. We found that shops with 2 techs had the highest SOAI at \$512 per action item.



OVERALL AVERAGE SOAI SIZE: **\$396**

WHAT IS AN SOAI?

A service order action item, or SOAI, is an itemized portion of a service order. Each action item details the cost and parts being ordered or pulled from inventory. Each entry on a service order will have that information so a customer can see, in detail, what's going on with their vehicle.

**All dollar amounts in USD.*

The highest region, however, was Canada, with their SOAIs averaging \$451.

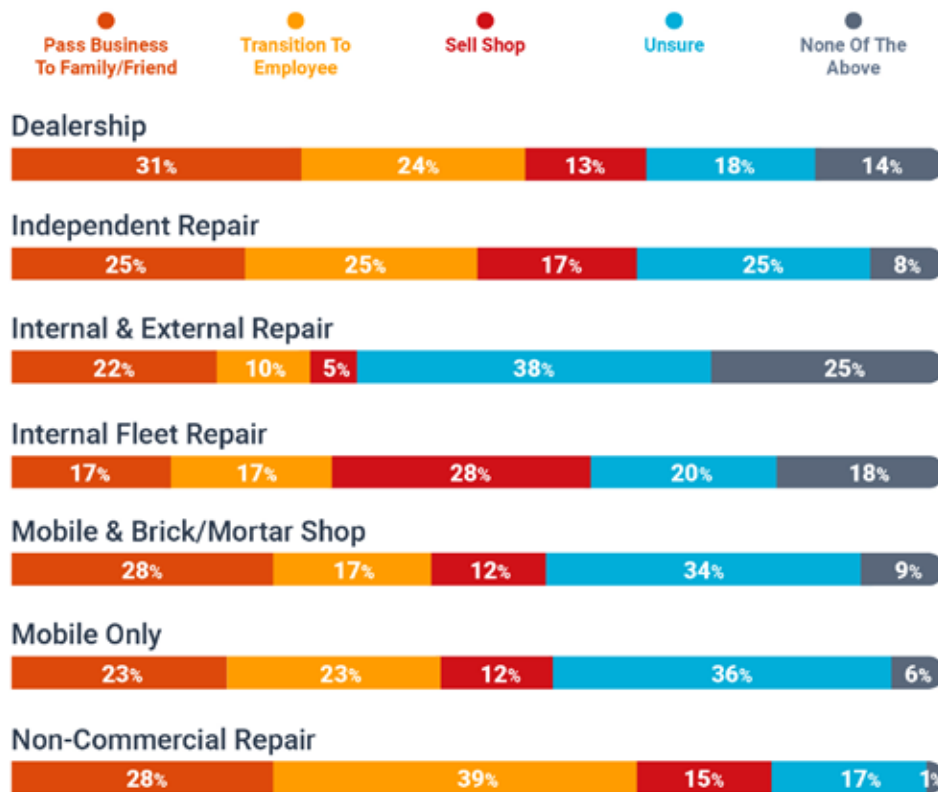


**All dollar amounts in USD.*

0011 SUCCESSION PLANNING

A quarter of our respondents haven't thought about a succession plan at all (although they might be after answering that question!). Over 62% of the owners we talked to have considered it, though: 25% plan to pass their shop on to a family member or friend, while 23% intend to pass it on to an employee. In addition, 15% are considering selling their shop to an outside party.

Larger shops seem more inclined to have a succession plan. Shops with eight or more techs in particular are likely to look for outside buyers. Interestingly, internal fleet repair shops are significantly more interested (28%) in selling to an outsider than passing it on to an employee or friend.



RP 1617



DEVELOPING AND LEVERAGING NEXT GENERATION LEADERS

If you want your shop to see long-term success, you need to cultivate new leaders to step in when the current generation retires or otherwise departs. RP 1617 lays out a comprehensive roadmap to assist in succession planning.

fullbay.com/RP1617



In a recent survey, 36% of respondents said that EPA regulations would be the largest disruptor of the trucking industry, while 26% of respondents are more concerned with AI, robotics, autonomous technology, [and others]. This shows the diverse challenges facing the industry over the next few years.



JAMIE IRVINE
HOST & CONSULTANT
The Heavy-Duty Parts Report



*Fullbay's passion is to create **a better life** for shops, which in turn leads to **safer roads for us all**. We believe that a more efficient and profitable shop creates happier employees, more effective inspections and preventive maintenance, and ultimately improves the safety of equipment on the road. This report is just one of the ways we hope to fulfill our passion by sharing the data, insights, and benchmarks we've collected from being the leading provider of shop management software in the commercial repair space.*



PATRICK MCKITTRICK

CEO,
Fullbay

A SPECIAL THANK YOU TO

OUR PARTNERS



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HEAVY-DUTY REPAIR SHOP MANAGEMENT.

Fullbay is an end-to-end repair shop management software that shows you exactly what's happening in your repair shop while boosting your staff's productivity. A more efficient business means higher profits, better work-life balance, and safer roads for us all.



TRACK EVERYTHING
IN THE SHOP



EASY INVOICES &
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